

# HOW TO ACHIEVE **BOLD CLIMATE** GOALS THROUGH ENHANCED **DECISION—MAKING**

Best practices from King County, WA



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# ABOUT THE TOOLKIT

## BACKGROUND: A PROCESS BORN FROM COLLABORATION

As one of the largest transit agencies in the United States, King County Metro (Metro) is setting a precedent by committing to a zero emissions (ZE) vehicle fleet as soon as 2035. This move demonstrates Metro’s values-driven ambition and leadership, with their bold action to reduce greenhouse gases, and commitment to maintaining safe and reliable transit services throughout this change.

Transitioning to net or real zero – particularly for the transportation sector – is no easy task. It requires many technical advancements and system optimizations in addition to significant organizational change. Seeing beyond the technical demands of the ZE transition, Metro’s ZE Team partnered with the Centre for Public Impact (CPI) to enhance Metro’s capabilities to break down silos across Metro teams, learn on the go, and navigate a complex and ever-changing landscape.

During the first year of the partnership, we built a systems-wide understanding of Metro. This included learning about agency-wide structures and practices, as well as staff’s interdependencies, relationships, and beliefs. Through this work, we identified eight key leverage points within Metro—areas where small shifts could create significant changes across the system. A central theme across these leverage points was decision-making.

In the second phase of the partnership, Metro’s ZE Team and CPI took action to transform the system by strengthening internal strategic decision-making processes related to ZE. This entailed creating, testing, and refining a decision-making process that would empower Metro employees to face a complex problem, and then collaboratively, transparently, and seamlessly develop ZE-aligned decisions.





Employees told us that the decision-making around zero-emissions projects was confusing, slow, and frustrating. We saw an opportunity to not just improve how decisions were made, but also to make a positive impact on relationships, collaboration, power dynamics, and attitudes. Working with CPI helped us connect with employees in a more meaningful way, and we hope this leads to lasting, transformative change.

- Martha Geoghegan, Internal Communications, Change and Transformation Specialist, Zero Emissions Team, Metro

The ZE Decision-Making Process was developed using information gathered from employee surveys and interviews, documentation of Metro's established decision-making methods, desktop research on best practices, and feedback from multi-divisional Metro teams that tested the drafted process with existing ZE-related decisions. This process is currently undergoing formal leadership review for broader organization adoption. We've adapted Metro's drafted process for wider usage with this toolkit

## PURPOSE AND GOALS: WHY DECISION-MAKING IS IMPORTANT AND HOW THIS TOOLKIT CAN HELP

Creating safe and healthy communities in a changing climate requires governments to adapt how they make decisions to be more collaborative, adaptable, and mindful of interdependencies. Done well, an effective decision-making approach allows you to:

- **Produce high-quality, values-driven outcomes:** Decisions made without a clear organizational strategy can vary in methodology and rigor, leading to outcomes that are misaligned with organizational values. This can weaken decision quality and reduce confidence in decision-makers. By systematizing upfront collaboration, requiring thorough research, and embedding values into decision-making criteria, agencies can minimize unintended consequences and maximize organizational and community benefits. At Metro, divisions and teams are working together to break down silos and consistently make ZE decisions in alignment with Metro's values. They are learning to leverage their unique differences, and rigorously evaluate options to produce thoughtful recommendations for action.
- **Increase agency clarity and accountability:** Decision-making is challenging without defined roles and responsibilities, clear processes, established communication channels, and standardized documentation. Failure to define these features can lead to confusion, inaction, and reduced capacity to learn from ongoing efforts. An effective decision-making approach can address these challenges by reducing duplication of efforts, transparently setting expectations, providing direction, and encouraging employees to collaborate and take initiative to drive the decisions that need to happen to advance their organization's mission. At Metro, employees flagged decision-making as an opportunity for improvement, which is why the Zero Emissions Team set out to co-create a ZE-specific decision-making process that includes each of the features described above.

The benefits of developing a strategic approach to making decisions do not diminish the fact that decision-making is difficult. Deciding on a new course of action can be daunting, not to mention fraught with economic, political, and social consequences. Particularly in the climate space, many choices involve expensive new investments and profound shifts in organizational norms. The constantly changing technological and political landscapes around climate introduce additional layers of complexity and uncertainty. These can create new risks and leave climate actors feeling stuck.

The decision-making process included in this toolkit can help you harness the power of strategic decision-making to advance climate action and values-driven change. Specifically, this toolkit can help you and your organization to:



**NAVIGATE THE COMPLEXITIES OF CLIMATE-RELATED DECISION-MAKING**  
through rigorous research and stakeholder engagement activities;



**EFFECTIVELY BREAK DOWN SILOS AND COMMUNICATE WITH STAKEHOLDERS**  
in a way that facilitates transparency and trust across your organization, and



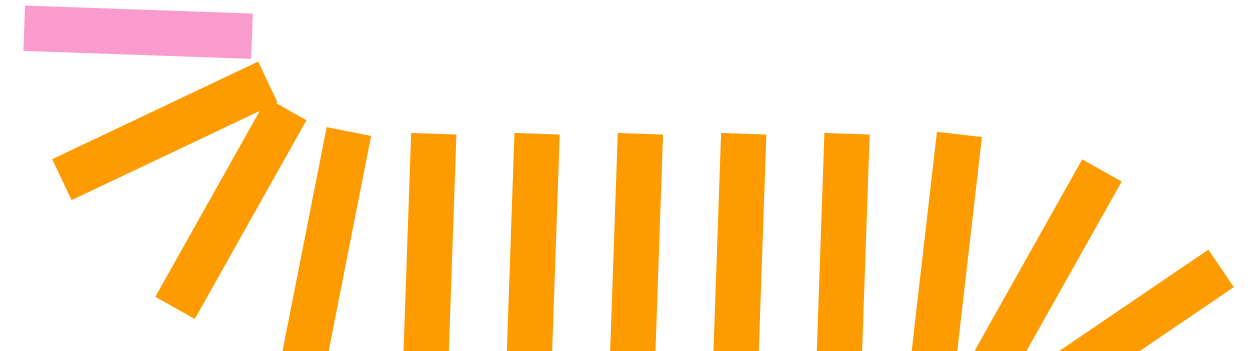
**SUPPORT ONGOING LEARNING AND IMPROVEMENT**  
for an effective, relevant, and widely applied internal strategy that fosters more people and planet-centered climate solutions.

The activities and templates in this toolkit can be a resource for municipal, county, and state-level government employees and their cross-sector partners to supplement their organization's broader decision-making strategy.



As we've grown the ZE program and started operating ZE vehicles, we realized how much of an impact this transition was going to have on all divisions within Metro. A decision made within a single group could often have unintended impacts on other groups. Because of this, we need to develop a strategy that intentionally and strategically gathers input from all groups and evaluates a consistent range of criteria.

- Wendy Cho-Ripp, Utilities & Resiliency Strategist, Zero Emissions Team, Metro





# HOW TO USE THIS TOOLKIT

This toolkit is a step-by-step guide designed to help you mobilize climate action through a comprehensive, transparent, and collaborative decision-making process. We encourage you to use the templates as inspiration for thinking, documenting, and communicating activities. The following tips for using this toolkit are informed by Metro's experience and can be applied as guiding principles for your broader organizational decision-making strategy.



## USE THE TOOLKIT TO COMPLEMENT ESTABLISHED PROCESSES AND ADAPT IT TO FIT YOUR CONTEXT AND NEEDS

Identify which decision-making processes, if any, you have to follow, and any process gaps. List their requirements and consider how you can jointly follow them and this toolkit. Adapting, reordering, or skipping process steps may be appropriate for some decisions based on your team's needs.



## PRACTICE THINKING ABOUT THE SYSTEM AS A WHOLE<sup>1</sup> TO INFORM CLIMATE DECISIONS AND MINIMIZE UNINTENDED CONSEQUENCES

Systems thinking involves defining all relevant components of the system and considering how different structures, relationships, power dynamics, and mindsets may be interconnected and impacted by the decision. A systems-informed approach can increase collaboration, power-sharing, and transparency and support more values-aligned decision-making.



## SHARE POWER BY MEANINGFULLY ENGAGING AND COMMUNICATING WITH RELEVANT STAKEHOLDERS AND AFFECTED ACTORS

Decisions made by governments or leaders can impact people within and outside the organization. Determine stakeholders' roles, how they might influence or be affected by this decision, and how to effectively collaborate, engage, and share power with them throughout the process.

<sup>1</sup> To learn more, see: FSG's [Water of Systems Change framework](#) and Donella Meadow's [Leverage Points: Places to Intervene in a System](#).



## MAKE MISSION-ALIGNED DECISIONS TO CREATE A LONGER-LASTING IMPACT

Refer to your organization's mission, vision, values, and climate goals to ensure that decisions align with your overall strategy and climate-related activities.



## REFLECT REGULARLY ON THE DECISION-MAKING PROCESS INDIVIDUALLY AND WITH COLLABORATORS TO DEVELOP A CULTURE OF LEARNING

Document and share lessons learned, successes, and opportunities for improvement with decision-makers and the broader organization. This will support the adoption of this process, and help develop a culture of learning and continuous improvement.



## ENSURE RIGOROUS DOCUMENTATION AND CONSISTENT COMMUNICATION TO KEEP STAKEHOLDERS INFORMED THROUGHOUT THE PROCESS

Use the templates to help document and communicate about the decision-making process, potential trade-offs, and outcomes. This can increase transparency and trust with partners, and boost confidence in the decision.



# STRATEGIC DECISION-MAKING TOOLKIT: STEPS FOR ADVANCING CLIMATE ACTION



# DECISION-MAKING CHECKLIST

This decision-making toolkit has been adapted from the decision-making process we developed with Metro’s ZE Team. It includes 4 phases and 12 activities. Use this checklist to keep track of the activities that you have conducted. Activities can be completed concurrently, out of order, or skipped if they do not feel necessary for your team or context.

## PHASE 1: PLANNING FOR DECISION-MAKING

Getting organized from the outset is essential for ensuring you have everything you need to make thoughtful and efficient decisions. Phase 1 equips you to understand the climate-related problem area better, identify relevant parties and organizational processes, select criteria for evaluating options, and plan to communicate your efforts.

- ☐ Activity 1: Define the climate opportunity or problem you are trying to address and describe the specific decision that needs to be made.
- ☐ Activity 2: Identify relevant parties and brainstorm how they may influence and/or be impacted by the decision topic.
- ☐ Activity 3: Identify and refine the criteria you will use to evaluate options and select top recommendation(s).
- ☐ Activity 4: Communicate about the problem and the need for a decision more broadly.

## PHASE 2: RESEARCHING THE DECISION AREA AND DEVELOPING RECOMMENDATIONS

Conducting research can help you better understand the climate-related opportunity or problem, and anticipate the potential impacts of your recommendations for a decision. Engaging stakeholders and impacted actors throughout the process can improve research, build trust, foster collaboration, and increase the likelihood of obtaining support for suggested changes.

Phase 2 equips you to design your research plan, gather essential information for decision-making, conduct your research and stakeholder engagement activities, develop and evaluate recommendations, and create a high-level implementation plan to ensure you’ve thoroughly considered the operational feasibility of your recommendation(s).

- ☐ Activity 5: Decide which information is needed to make the decision, and how you will gather it (including planning for stakeholder engagement).
- ☐ Activity 6: Perform your research and engagement plan, and note key insights that will inform the selection of your top recommendation(s).

- ☐ Activity 7: Develop recommendation options and evaluate them against relevant criteria to produce your top recommendation(s).
- ☐ Activity 8: Create a high-level implementation plan to support decision-makers with making an informed decision.

## PHASE 3: MAKING AND COMMUNICATING THE DECISION

Communicating recommendation(s) to the decision-maker(s) will help them understand the nuances of the decision and why you’ve recommended a specific path forward. Rigorously documenting your process is critical for capturing key insights, rationales for decisions, and lessons learned.

Phase 3 equips you to communicate your recommendation(s), celebrate with your team, share about the decision more broadly, and document the process.

- ☐ Activity 9: Communicate your top recommendation(s) to the relevant decision-maker(s) and celebrate!
- ☐ Activity 10: Upon decision confirmation, communicate the decision more broadly and thoroughly document the process. Note: ideally, you’ve been documenting the process by completing the templates, which will save you time with this step.

## PHASE 4: IMPLEMENTING AND MONITORING THE DECISION

Building out the high-level implementation plan after the decision is confirmed will ensure a smooth transition into implementing the decision, and support the implementers with maintaining and tracking progress. Evaluating the impact of a decision ensures you are addressing the problem, producing the desired impact, and recognizing when any adaptations to the decision are needed. Reflecting on the decision-making process supports learning and continuous improvement.

Phase 4 equips you to plan for implementation, monitor progress, evaluate the impact of your decision, and reflect on the process as a whole.

- ☐ Activity 11: Build out a detailed implementation plan.
- ☐ Activity 12: Launch implementation, track progress and impact, and reflect on decision outcomes to support continuous implementation and learning.





# PHASE 1: PLANNING FOR DECISION-MAKING

Activity 1: Define the climate opportunity/problem you are trying to address and describe the specific decision that needs to be made.

Apply a detailed look at the climate-related opportunity/problem area by considering key elements like the scope, audience, history, and why it matters. Looking at future outcomes can help you begin weighing the environmental, social, and economic impacts of addressing the opportunity/problem. Lastly, naming the specific decision that needs to be made, and the timing for it will help you to prioritize whether this is an urgent need or one that can wait. If you realize that it is unnecessary to make a decision, feel free to end the process here. Please note: You may need to do research to understand the opportunity/problem better. Feel free to reference the templates in Activities 5 and 6 for ideas on conducting your research.

DEFINING THE CLIMATE-RELATED OPPORTUNITY/PROBLEM AREA	
The opportunity/problem you are trying to address (reflect on: what is the opportunity/problem, who it affects, where it's located, why it matters, and relevant backstory)	The decision that needs to be made
Ideal outcomes if this opportunity/problem is addressed (reflect on: what would success look like?)	Why this decision should be made now

# Activity 2: Identify relevant parties and brainstorm how they may influence and/or be impacted by the decision topic.

Relevant parties include both internal and external entities/individuals. The goal is to cast a wide net to identify all relevant parties and their likely role in the process – future activities will help you narrow this list to key stakeholders (groups and individuals you need to engage with for your decision area) and decision-maker(s). To help brainstorm relevant parties, consider: who is directly impacted, who is indirectly impacted or has a vested interest, who has expertise in the topic, who can represent diverse perspectives, and who you need to partner with for decision implementation. Community-based organizations and residents are often important parties in your decision-making process. We encourage you to think deeply about how you might engage them throughout this process.

Additionally, be flexible when identifying the potential decision-maker. Depending on the type of decision and governing body requirements, your decision-maker could be a specific governing body, a director, a work group, an individual with decision-making authority, or a group of those most impacted by the decision. There may be instances where you request and provide a rationale for having decision-making authority delegated. Reference the ‘Decision-Making Roles and Descriptions’ table below for more ideas. Note, that other role frameworks may be more applicable for your organization.

DECISION-MAKING ROLES AND DESCRIPTIONS
Potential Decision-Maker: those with decision-making authority who may be responsible for making the final decision
Subject Matter Expert (SME): advises or provides input on climate-related decisions
Recommender: works with SMEs to develop recommendations, facilitates their presentation to decision-makers, and communicates about these efforts
Approver: signs off on the recommendation before it is presented for decision
Implementer: carries out decisions
Experiencer: experiences the problem area and/or lives with the decision’s effects (are often key SMEs, given lived experience)



# RELEVANT PARTIES INITIAL BRAINSTORM AND ROLE SELECTION

<b>List Relevant Parties' Names</b> Try to consider as many people and groups as possible! You can narrow your list later.  As you list the relevant parties, consider cross-functional committees, directors, and employees at different levels of your organization's hierarchy and external partners such as community organizations, residents, climate leaders and NGOs, local businesses, academic institutions, and other government entities.	Mark Potential Decision-Making Roles						<b>Optional - Jot Down Notes</b> Use this space to jot down any notes or things you want to consider about specific relevant parties. This could include existing relationships with them, previous engagement activities, their role in the community, opportunities to get input or engage them, initial thoughts on how they may influence and/or be impacted by the decision topic, etc.
	Potential Decision-Maker	Subject Matter Expert (SME)	Recommender	Approver	Implementer	Experiencer	

# Activity 3: Identify and refine the criteria you will use to evaluate options and select top recommendation(s).

Decision-making criteria are the factors that individuals or organizations use to evaluate options and choose the best course of action when making a decision. If needed, review your organization’s or team’s decision-making criteria and refine them to fit your topic. When selecting criteria, make sure you have a definition of the criteria and what it means in practice. It may be helpful to rank these criteria in order of priority – criteria that recommendations are required to meet to be considered viable should be the highest priority. We encourage you to partner with other key stakeholders for this step.

Examples of key criteria used by King County Metro to assess recommendations for a decision include:



**ALIGNMENT WITH METRO'S MISSION:**

the recommendation enables Metro to deliver on our mission to provide safe, clean, and reliable mobility services that people find easy to use.



**SAFETY AND SECURITY IMPACTS:**

the recommendation enables Metro to fulfill its commitment to designing structures and services that support the physical health and well-being of Metro’s employees, customers, and communities.



**ABILITY TO MAKE PROGRESS TOWARD THE ZE 2035 GOAL:**

the recommendation supports activities, investments, projects, or other actions that make progress toward the zero emissions goal as outlined in the Zero Emissions Work Plan / Implementation Plan.



**OPERATIONAL FEASIBILITY:**

the recommendation is scoped so it can be successfully implemented based on Metro’s existing and planned resources (e.g. staff, time, physical space, infrastructure, technology, equipment, etc). When there is limited information, recommendations should document where there is data or information gaps.



**ENVIRONMENTAL AND SUSTAINABILITY IMPACTS:**

the recommendation reinforces Metro’s short- and long-term resilience amidst the climate crisis and aligns with the County’s Strategic Climate Action Plan.



**EQUITY IMPACTS:**

the recommendation enables Metro to fulfill its promise that people furthest from the center of power and privilege have meaningful access to opportunities to help them thrive and investments are prioritized where needs are the greatest.

[template on next page]




DECISION-MAKING CRITERIA WITH DEFINITIONS AND RANKINGS

Criteria Name	Definition (be specific to ensure alignment on your criteria's meaning)	Level of Importance Relative to Other Criteria (1 = most important, 5 = least important)



# Activity 4: Communicate about the problem and the need for a decision more broadly.

This is critical for increasing transparency, ensuring that relevant parties are informed, and avoiding the risk that other teams are working on (or maybe have already addressed) the same need. Further, raising awareness early, before relevant parties are engaged in research or solution development, greatly improves the quality of participation and buy-in to the process. In this activity, use the prompts to develop and implement a messaging strategy, including the key talking points you will use to communicate. Treat this as a summary intended for a larger audience, rather than a comprehensive explanation of your work thus far.<sup>2</sup>

MESSAGING STRATEGY				
Who is the audience for this message? Consider the potential decision-makers, subject matter experts, recommenders, approvers, implementers, and experiencers from Activity 2.				
Who is working on this opportunity/problem?		Who is delivering this message, and how are they delivering it?		
KEY TALKING POINTS				
What is the opportunity/ problem we need to address? What would shift if we were successful?		What is the decision we need to make and why?		What is the process that we are following to make this decision?
				What is our timeline and when can you next expect to hear from us?

<sup>2</sup> Template adapted from the Bureau of Planning and Sustainability’s Equity Toolkit. City of Portland. 2022. Page 27.

# PHASE 2: RESEARCHING THE DECISION AREA AND DEVELOPING RECOMMENDATIONS

## Activity 5 (Step 1): Decide which information is needed to make the decision, and how you will gather it.

First, plan out the information needed to make a well-informed decision. Note that specific information might be required to evaluate your recommendations. Review your evaluation criteria (Activity 3) to confirm if there are any information requirements you need to meet. Then, plan the high-level research and stakeholder engagement processes you will use to inform the decision. Please note: Step 2 of this activity focuses on making a detailed stakeholder engagement plan. You can complete it alongside this step.

DEFINING THE CLIMATE-RELATED OPPORTUNITY/PROBLEM AREA		
<div>Information needed for decision<sup>3</sup> Consider which factors might influence the outcomes of your decision to guide research.</div> <div>Information gathering ideas<ul style="list-style-type: none"><li>Literature Review</li><li>Surveys</li><li>Focus Groups</li><li>Interviews</li><li>Benchmarking</li><li>Desk Analysis</li><li>Forecasting and Modeling</li><li>Testing and Iterating</li></ul></div>	<div>Key information needed<sup>4</sup> Metro Example: Impact on service reliability for a specific neighborhood</div>	<div>Gathering method Metro Example:<ul style="list-style-type: none"><li>Modeling potential service impacts</li><li>Cost estimate of renting additional coaches</li><li>Resident/business feedback via focus groups</li></ul></div>

<sup>3</sup> Bureau of Planning and Sustainability’s Equity Toolkit. City of Portland. 2022. Page 22.  
<sup>4</sup> Think ahead: this key data may be relevant later on for identifying KPIs or targets to measure the decision’s success.

# Activity 5 (Step 2): Determine how to engage specific stakeholders and/or groups, including when to follow up with them throughout the decision-making process.

Revisit Activity 2 and narrow your list of relevant parties to a group of key stakeholders with defined roles (i.e., groups and individuals you need to engage for your decision area). Remember to include community members, if relevant. Please review the ‘Reflection Questions’ table below if you need support with this task.

Then, create an engagement plan<sup>5</sup> to support information gathering, information sharing, **and** power-sharing (Note: template is on the following page). Information-related engagement activities may include: recurring meetings, written/verbal feedback, input/analysis from a subject matter expert or experienter, surveys/interviews, community consultations, or monthly emails to share key updates. Power sharing is a spectrum, as such, example activities may include: involving impacted people in decision-making by asking for their input and letting them know how you will use it, considering different perspectives, communicating process updates, and giving people a chance to provide feedback, consensus building, voting, or delegating decision-making authority to diverse actors.

We strongly recommend that you report back to key stakeholders about what you heard and how their feedback was (or wasn’t) applied to the recommendation. This is critical to sharing power, building trust, demonstrating transparency, managing successful change, and building support for the decision. Please note: this activity uses information from Activity 2, and you can complete it alongside the previous step. You may also want to use this tool to plan future updates to those you communicated with in Activity 4.

REFLECTION QUESTIONS FOR NARROWING THE RELEVANT PARTIES LIST TO KEY STAKEHOLDERS
How will they be affected by the decision area?
Do they have a notable influence or impact on the decision’s success? (e.g. they must approve, will be implementing, etc.)
Are there any notable risks if they aren’t engaged? (e.g. political, reputational, equity)
Do your organization’s policies require you to engage with this stakeholder?

<sup>5</sup> Bureau of Planning and Sustainability’s Equity Toolkit. City of Portland. 2022.



DECISION-MAKING CRITERIA WITH DEFINITIONS AND RANKINGS

Key stakeholder name	Engagement type <sup>6</sup> / Activity (e.g. info gathering/ survey)	What are your objectives?	When will this occur?	Who is leading engagement?	What risks need to be considered? <sup>7</sup>	Follow-up plan (e.g. reporting back to stakeholders)

6 Engagement types include: information gathering, information sharing, or power sharing. Activities refer to the specific type of outreach (e.g. survey, town hall, voting, etc.) that you conduct.

7 Additional planning or coordination may be needed to mitigate risks such as environmental, labor, political, safety, reputational, equity, and accessibility. Special considerations may be needed for engaging with vulnerable populations. Coordinate with teams that specialize in supporting these areas to appropriately navigate risks and ensure alignment and consistency with existing organizational efforts.

# Activity 6: Perform your research and engagement plan, and note key insights that will inform the selection of your top recommendation(s).

Documenting key insights that inform your evaluation of different options will save time when reporting your research later. Key insights may include data on the problem’s context, potential risks/unknowns, assumptions, impacted stakeholders, environmental and labor implications, estimated costs, implementation and change management needs, anticipated impacts, and training and communication needs, among other areas. In this activity, reflecting on any pivots that need to happen with your approach and testing your results with key stakeholders (as appropriate) may<sup>5</sup> also be helpful.

KEY INSIGHTS TO INFORM ASSESSMENT AND TOP RECOMMENDATIONS		
Key Insight or Data Point	Category (e.g. potential risk, estimated cost)	Implications (e.g. why this matters)

# Activity 7: Develop recommendation options and evaluate them against relevant criteria to produce your top recommendation(s).

Based on the information you have gathered, develop a few options that could address the problem. At this point, it may be helpful to take a step back and look at the larger picture as you weigh the different options. Evaluate each potential recommendation against the criteria prioritized in Activity 3. Consider each option’s feasibility and your organization’s ability to obtain the required implementation resources, including the projected cost, timeline, workforce, and skills needs. It may be beneficial to bring in other stakeholders, including community members, to give feedback on the options and highlight any aspects that might negatively impact them. Use the following template to document your evaluation and considerations.<sup>8</sup> When assessing the risks, you must consider your organization’s risk appetite and ensure alignment with existing guidelines. By the end of this activity, you should be able to select your top recommendation(s). Note that this template may be helpful to complete alongside Activity 8.

OVERVIEW OF POSSIBLE RECOMMENDATION OPTIONS FOR A DECISION (HIGHLIGHT YOUR TOP RECOMMENDATION(S))

Possible Recommended Decision:		
Pros:	Notable Opportunities to Create Value:	Anticipated Impacts:
Cons:	Notable Risks / Unknowns:	Assumptions:

Possible Recommended Decision:		
Pros:	Notable Opportunities to Create Value:	Anticipated Impacts:
Cons:	Notable Risks / Unknowns:	Assumptions:

<sup>8</sup> Examples of assumptions made by Metro teams may include: assuming a certain level of service, technology, range, sequencing, staffing scenario, environmental impacts, and more.



# Activity 8: Create a high-level implementation plan to support decision-makers with making an informed decision.

Now that you have your top recommendation(s), you may need to develop a high-level implementation plan to demonstrate the feasibility of each option. Your organization’s decision-makers might require this information for more rigorous evaluation and to make an informed decision. Additionally, the level of detail required may vary based on your decision-maker’s expectations and organization’s requirements.

Depending on your role, implementation responsibility may shift to someone else after the decision is confirmed and/or require coordination with multiple teams. You should loop in implementers to confirm roles and collaborate on this activity.

At a minimum, we encourage you to include the following in your implementation plan:

- High-level project plan,
- Timeline with key milestones (including a list of future decisions and who would need to make them),
- Preliminary roles and responsibilities list,
- High-level budget,
- Monitoring and assessment plan, and
- Risk mitigation plan.

HIGH-LEVEL IMPLEMENTATION INFORMATION REQUIRED TO PRESENT A RECOMMENDATION TO DECISION-MAKERS
List any high-level implementation materials you need to prepare to support your decision-maker with making an informed decision. See the bulleted list to the left, and the checklist in Activity 11 for ideas on what you could include here.

Additional implementation requirements (e.g., permits, procurement, technology, hiring) may also need to be planned for. Note these in your implementation plan. Following confirmation of the decision, you should develop your implementation plan in greater detail.

[Note, we did not include a template because every organization has unique practices and requirements around the depth of implementation planning needed for decision-making. Feel free to use the checklist in Activity 11 for more ideas on implementation planning.]

# PHASE 3: MAKING AND COMMUNICATING THE DECISION

## Activity 9: Communicate your top recommendation(s) to the relevant decision-maker(s) and celebrate!

We encourage you to solicit feedback from key stakeholders to align on what you’re presenting and to share power. Submit your recommendation to the decision-maker(s) using their required form, template, or other appropriate format, and celebrate! Regardless of the decision outcome, you’ve conducted a transparent, collaborative, and robust decision-making process. Take a moment with your collaborators to recognize the team’s hard work. If appropriate, you can extend this celebration to include broader partners and stakeholders too. After submitting, you may want to share a status update with broader stakeholders who have contributed to the process. This can help increase the transparency of the decision-making process, improve buy-in, and build trust. Note – you may need to revisit earlier activities if the decision-maker requests adjustments or does not approve of your recommendation(s). Consider the prompts below for guidance. We highly recommend adapting this template to your specific context and decision-maker’s requirements.

TOP RECOMMENDATION(S) BEING COMMUNICATED TO DECISION-MAKERS	
Recommended Decision:	
Problem / Opportunity Area Description:	Relevant Background:
Opportunities to Create Value / Anticipated Impacts:	
Risks / Unknowns / Anticipated Impacts: (may include, but are not limited to: operational, environmental, labor, legal, financial, safety, reputational, stakeholder, and equity)	

Risk Mitigation Plan:	
Estimated Costs:	Estimated Labor and Resourcing:
Key Implementation Requirements/Needs: (including potential partners)	
Recommended Timeline:	
Key Assumptions in this Analysis:	
Alternative Recommendations Considered:	
Evaluation Criteria:	



## Activity 10: Upon decision confirmation, communicate the decision more broadly and thoroughly document the process.

Congratulations - your recommendation was approved! At this stage, you should communicate about the confirmed decision and process more broadly. Revisit the messaging strategy and talking points developed in Activity 4. Update the audience with any new relevant parties (Activity 2) or key stakeholders (Activity 5) you'd like to address and revise your talking points with the latest information. When selecting a messenger, consider who has the authority to direct decision implementation and who has trust and credibility with those most impacted by the decision. Note - at this stage, you may also need to partner with your organization's communication experts to communicate the decision to employees, external partners, and the broader public.

You will also need to ensure you've formally documented the decision - if you've been completing these templates along the way, this task will be less intensive. Documentation should include information on the overall process, background context for the decision, stakeholder engagement information, research methodology and insights, recommendations with analysis, criteria used for decision-making, information on risks, implementation plans, and formal approval records or documentation of approval meetings. By documenting these elements, you create a comprehensive record that can support transparency, accountability, and future learning. Documents should be shared and saved in an accessible location and per your organization's records management policies.

[Note, we did not include a template for this activity. Instead, please revisit the messaging strategy and talking points developed in Activity 4.]

# PHASE 4: IMPLEMENTING AND MONITORING THE DECISION

## Activity 11: Build out a detailed implementation plan.

Update and add details to the elements included in the high-level implementation plan developed in Activity 8. Use the checklist below as a guide for the types of documents that you may need to prepare. Specific elements and the level of detail might vary depending on your organization’s requirements. If you are not the implementer, you should collaborate with them on this activity. Make sure that all other necessary stakeholders are looped in and aware of their roles.

SUGGESTED IMPLEMENTATION PLAN CHECKLIST (ADAPT BASED ON YOUR ORGANIZATION'S REQUIREMENTS)	COMPLETED?
Timeline and Project Plan	<input type="checkbox"/>
Roles and Responsibilities Chart	<input type="checkbox"/>
Documentation Requirements	<input type="checkbox"/>
Budget Tracker	<input type="checkbox"/>
Communication Plan [Reference the communication framework from Activity 4 and stakeholder engagement plan from Activity 5, Step 2]	<input type="checkbox"/>
Evaluation and Monitoring Plan	<input type="checkbox"/>
Change Management Plan	<input type="checkbox"/>
Risk Mitigation Plan	<input type="checkbox"/>
Other implementation requirements:	<input type="checkbox"/>
Other implementation requirements:	<input type="checkbox"/>

# Activity 12: Launch implementation, track progress and impact, and reflect on decision outcomes to support continuous implementation and learning.

It's time to move into implementation. At this stage someone else may take over this process - please make sure they are briefed on this decision-making process and prepared to carry this work forward. Work with them to evaluate the decision's impact throughout implementation, and create accountability to ensure continuous implementation. Proactively communicate project progress. As you communicate, share significant shifts in the timeline (both progress and delays), insights about feasibility based on new information, and any unintended impacts—whether positive, neutral, or negative. Revisit the decision if there is new critical information that indicates you should take a different approach, or if the solution fails to address the initial problem.

Reflecting on the decision-making process with your collaborators, and debriefing the experience with key stakeholders, including decision-makers, can help develop a culture of learning and continuous improvement. Be sure to document and share lessons learned with the broader organization, and use specific feedback to continue refining this process. Please note: reflection and evaluation activities can occur throughout the decision-making process - it may be helpful to conduct them on an ongoing basis so you can adapt your process and collaborations accordingly.

DECISION-MAKING CRITERIA WITH DEFINITIONS AND RANKINGS					
Key Evaluation Touch points	Anticipated Impact Expectations	Observed Impact Reality	Insights Why have we seen these outcomes?	Ramifications How does this affect communication, logistics, or timelines?	Takeaways + Next Steps How does this inform the current plan / Do we need to make adjustments?

# REFLECTIONS FROM USING THE DECISION-MAKING PROCESS

As part of Metro's commitment to continuous improvement, Metro's ZE Team and CPI piloted the decision-making process with three cross-divisional teams over five weeks. Each team applied the process to a different zero-emissions challenge that the organization felt stuck on. We used the feedback from this experience to adapt the process and overall strategy so it better met Metro's needs.

During this process, a truism arose at Metro that is also evident in almost all changes within complex organizations: the obvious solutions are both invaluable and very challenging. These crucial components include 1) diverse stakeholder engagement; 2) clear guidance on reconciling new systems with existing ones; and 3) accessible, reliable support during operational transitions. We recommend that you continue working on these well-known best practices while considering the additional lessons that emerged from our experience.



## INVESTING IN STRATEGIC ALIGNMENT AND ORGANIZATIONAL CAPABILITIES CAN ENABLE TRANSFORMATIVE CLIMATE ACTION.

People often expect climate work to have a tangible outcome directly related to addressing the climate crisis. However, climate work should also include developing a shared understanding of organizational goals and transformation to foster deep, sustained impact. For Metro, focusing on decision-making was an opportunity to expand employees' abilities to learn about, collaborate on, and develop solutions to major ZE transition challenges. By expanding these abilities, employees were better equipped to work through the complexities and uncertainties of evolving climate technologies. This led them to make progress with developing recommendations for infrastructure-related decisions that previously felt risky due to the magnitude of investment and operational impact.



We have a perspective now in terms of what needs to be done thanks to our growing awareness of the system and its implications for decisions.

- Participant from Metro ZE Decision-Making Strategy Application Period

## 2



## EMBEDDING COLLABORATIVE, EQUITABLE, AND EXPERIMENTAL WORKING METHODS INTO NEW AND STRAIGHTFORWARD PROCESSES CAN PROMOTE PROFOUND BEHAVIORAL AND CULTURAL CHANGE.

Shifting internal behaviors and beliefs can feel daunting and sometimes impossible. However, designing processes and strategies that are embedded with values-driven approaches can make it easier for employees to change their behavior over time. The decision-making strategy and process encouraged Metro employees to understand and appreciate different teams' perspectives and reasons for making decisions. It also guided employees to reflect on past decisions and pivot when appropriate. We expect that following this strategy will support Metro as it continues to build a culture of equitable collaboration, and continuous learning.



It's easy to identify problems, but it's harder to figure out how to solve them. Experimentation creates a framework to try something new and if it fails, that's okay. We can start again. The benefit of experimentation is you can learn what sticks and what works, and then build on those smaller successes.

- Wendy Cho-Ripp, Utilities & Resiliency Strategist, Zero Emissions Team, Metro

## 3



## INTENTIONALLY ALLOCATING TIME FOR EMPLOYEES TO COLLABORATE ON IMPORTANT, BUT CHALLENGING, ISSUES CAN HELP RESOLVE ONGOING STICKING POINTS.

Some crucial decisions can get indefinitely pushed back or overlooked because they lack an appointed owner, aren't deemed urgent, feel too high stakes to address, or may not be needed to maintain daily requirements. Moving these types of decisions forward may require a trusted entity to convene relevant stakeholders and set a timeline to take action. Through the application period, the ZE team created a space for multi-divisional staff to focus on three important issues that had previously fallen behind due to a lack of clear ownership and urgency. Teams were excited to have structured time to address salient issues and make substantive progress during this partnership.



"Our work happens in silos quite often, so this [working in cross-divisional teams during the Application Period] helped us break out of the silos to talk to other folks that we really needed to get information from."

- Participant from Metro ZE Decision-Making Strategy Application Period



## DEMONSTRATING COMMITTED, VALUES-ALIGNED LEADERSHIP CAN INCREASE STAFF CONFIDENCE, TRUST, AND ADOPTION OF CHANGES REQUIRED TO MEET AN ORGANIZATION'S CLIMATE-RELATED GOALS.

Launching a new strategy or process isn't just about communicating information; it's also about setting a tone and inviting others to engage similarly. To encourage a humble, curious, and fail-forward mindset for ZE decision-making, the ZE Team launched the strategy's pilot phase by hosting a fireside chat with leaders from across Metro. These leaders shared vulnerable reflections on when they have had to make challenging decisions, how they've navigated those experiences, and what they've learned. This was a powerful and quick way of demonstrating people-forward leadership and commitment to the work.



Creating and launching a decision-making strategy can impact how power is shared within an organization. It helps make decision-making more inclusive, clear, and accountable. This shift can also reduce resistance to change and make it easier to move to new ways of working.

- Martha Geoghegan, Internal Communications, Change and Transformation Specialist, Zero Emissions Team, Metro



# CONCLUSION



For the ZE program, this decision-making process seeks to increase transparency in how decisions are made; empower those closest to the work (who may lack decision-making authority) to provide input and drive recommendations for feasible implementation; and establish norms to document complexity so that decision-makers can make durable and data-informed decisions.

Through clear process and rigor, we hope this effort ensures that leaders and staff have more confidence and trust that decisions are made with comprehensive consideration of trade-offs and interdependencies.

We also recognize that adopting this new process will be challenging and are committed to working with impacted parties to continue to refine the process while balancing the need to efficiently make decisions in the best interest of Metro.

- Huoi Trieu, Zero Emissions Program Director, Metro

Even when governments develop climate action plans, it can be remarkably difficult to make the decisions necessary to implement commitments. Between costly investments in infrastructure, evolving technology, increasing climate risks, and other uncertainties, it is understandable why many governments get stuck in the planning stage and fail to take action.

While we can't control where or when the next climate-related disaster may strike, governments can create processes that enable effective climate action and lead to resilience in the face of short-term and long-term threats. By adopting decision-making processes like the one shared in this toolkit, public agencies and government leaders can make more informed, values-aligned, and timely decisions to reach net zero goals and minimize future emissions. These actions can also support staff in building core skills and mindsets for navigating the intersections of complex social-environmental issues in their daily operations.





We commend the efforts of government agencies like King County Metro, that are bravely stepping into uncertainty and taking bold steps to reduce greenhouse gas emissions. As Metro looks to the future, its leadership team is formally reviewing the ZE Decision-Making Strategy and Process for Metro-wide adoption, with a decision anticipated by the summer 2025. In the meantime, the ZE team is continuing to work with other Metro divisions to apply and improve upon the process shared in this toolkit. We're excited to see how their organization evolves to become more collaborative, equitable and learning-oriented as a result of this work.

We hope that the need for this toolkit resonates with you and that you try applying it in your organizational context. We are always excited to hear reflections; please let us know what you learn!



# PARTNERING WITH CPI AND KING COUNTY



[The Centre for Public Impact](#), a not-for-profit founded by the Boston Consulting Group, supports government, civil society, and public sector organizations across the globe to redesign systems, work, and cultures. By helping them embrace complexity, value relationships, and prioritize learning, we are shaping a new future of government, reimagined so that it works for everyone.

Visit our website at [centreforpublicimpact.org](#), sign up for our newsletter ([centreforpublicimpact.org/newsletter](#)), or contact [kate@centreforpublicimpact.org](mailto:kate@centreforpublicimpact.org) if this work inspires you and you want support in addressing a complex challenge.



The largest public transportation agency in the Puget Sound region, [King County Metro](#) provides bus, on-demand, paratransit, vanpool, and water taxi services, and operates Seattle Streetcar, Sound Transit Link light rail and Sound Transit Express. In 2022, the Federal Transit Administration recognized Metro's climate plan as the nation's most equitable in tackling climate change.

Learn more about King County Metro's [Zero Emissions](#) journey and reach out to their team: [kingcountymetroze@kingcounty.gov](mailto:kingcountymetroze@kingcounty.gov).

# ACKNOWLEDGEMENTS

This work would not have been possible without the partnership and commitment of Metro's Zero Emissions Team, with special thanks to leadership from Christina Arthur, Wendy Cho-Ripp, David Eldred, Martha Geoghegan, Gwyn Howard, and Huoi Trieu. Thank you to Alex Conn for providing logistical and administrative support services throughout the course of this work.

Other Centre for Public Impact contributors to the project who are not listed as authors include: Majo Acosta Robayo, Allan Co, Gabrielle Beran, Jane Urheim, Josh Sorin, Aurora Horwood, and Vicky Gomes.

Research and insights could only inform both our strategy and recommendations thanks to the 38 anonymous survey respondents as well as interview contributions from: Michelle Anderson, Jon Bez, Margaret Brubaker, Katie Chalmers, Gwen Clemens, Curt Dickie, Martha Geoghegan, Will Haber, Gwyn Howard, Kevin Kibet, Sunny Knott, Carly Macias, Hannah McIntosh, Ron Moattar, Scott Niskanen, Patricia Spanjer, Bill Thon, Huoi Trieu, Danielle Wallace, and Natalie Westberg. The context and thoughtful insights shared are key to informing Metro's successful, values-driven transition to zero emissions.

Lastly, we'd like to acknowledge the contributions of the following employees who helped to test the strategy and provided feedback. Thank you to: Christina Arthur, Wendy Cho-Ripp, Theresa Do, Zeenab Fowlk, Gina Franco, David Gehrman, Martha Geoghegan, Will Haber, Andre Helmstetter, Gwyn Howard, Tom Keelan, Kevin Kibet, Alex Kiheri, Sunny Knott, Jeff Long, Carly Macias, Michael Marks, Peter Mumford, Matt Rawson, Brandon Reno, Nicholas Richter, Bradley Rush, Stephen Ryker, Brandt Scanlan, Lisa Shafer, Patricia Spanjer, Huoi Trieu, and Natalie Westberg.

Our framework and approaches to decision-making also took inspiration from prior work by the Centre for Public Impact and by other organizations. Some resources are cited below:

- CPI, the Knight Foundation, and Google: [The Opportunity Project for Cities sprint toolkit: A guide for community-driven innovation sprints in local governments](#)
- Donnell Meadows: [Leverage Points: Places to Intervene in a System](#)
- FSG: [Water of Systems Change Framework](#)
- ICLEI USA: [The Ambition Gap: From Intent to Implementation in Local Climate Action](#)
- Portland Bureau of Planning and Sustainability: [2022 Equity Toolkit](#)

This document was written by Leselle Vincent, Carina Gormley and Katie Stenclik. The Strategic Decision-Making Toolkit Section was written in partnership with Christina Arthur, Wendy Cho-Ripp, Martha Geoghegan, Gwyn Howard, and Huoi Trieu.

It was released on March 13, 2025, under a Creative Commons Attribution-ShareAlike license. It should be cited as: "How to Achieve Bold Climate Goals through Enhanced Decision-Making; Best practices from King County Metro, WA" [2025]. Washington, D.C.

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