A 10-year investment to establish a self-sustaining movement focused on improving social and environmental conditions
Those of us involved in the Puyallup Watershed Initiative wish to acknowledge the indigenous people of the region.

We are proud and grateful for the opportunity to be working toward the sustainable future of these Native lands.

Henry Izumizaki
Strategy Director
The Russell Family Foundation
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Foreword

In 2012, The Russell Family Foundation launched its most ambitious undertaking ever: the creation of a community-led, community-owned movement dedicated to improving social and environmental conditions throughout the Puyallup River watershed – a vast region that spans from the peaks and glaciers of Mt. Rainier National Park through forests, farmland and towns down to the City of Tacoma and the shores of Puget Sound.

Going in, we had a vision but no framework. We knew it would be a long-term commitment to build structure and capacity for this unprecedented undertaking, which we call the Puyallup Watershed Initiative (PWI). We gave ourselves 10-years to evolve from a foundation-run initiative, to a sustainable, community-owned enterprise.

Since launch, our progress has been steady and significant. We are building a broad coalition of businesses, nonprofits, government agencies and individuals to participate in working groups called Communities of Interest. These teams focus their energy on specific issues including transportation, local food, natural resources, environmental stewardship, public health, social justice and much more.

The collective nature of the PWI is what sets it apart. It is a grassroots effort grounded in the belief that the people who live and work in a place understand it better than anyone else does. And these people, given the proper support and resources, will come up with the best ideas to address our persistent challenges and promising opportunities.

While we’re still in the early phases of this far-reaching initiative, over time, we expect to see our efforts produce tangible outcomes reflected in land use decisions, improved water quality, thoughtful public policies and greater public stewardship of our green and urban spaces. Above all, we aim to bring people together to tackle issues that once seemed beyond reach.

No doubt, we will encounter some messy, challenging situations along the way. But we’ll learn from our experience, listen to our communities and share what we know. In that spirit, we offer this white paper as a record of our journey. We hope you will join us. Together we can go farther and set new standards for others to follow.

Henry Izumizaki

Strategy Director
The Russell Family Foundation
A New Approach to Community-Centered Change

The Russell Family Foundation (TRFF) began the Puyallup Watershed Initiative (PWI) with the desire to use its philanthropic dollars to increase community resilience throughout this diverse region, which is confronted by significant growth and urbanization. Widespread development in the region carries with it widespread consequences, such as more polluted stormwater runoff and the loss of farmlands, forests and recreation areas.

The Puyallup Watershed includes 1,000 square miles, 316,000+ people, 2 Tribal nations, 17 cities and towns, pristine forests, rich agricultural lands and one of the busiest ports on the West Coast. As the region continues to grow, the sale and subdivision of land can fracture forest habitat, threaten working forests and take local farmlands out of production. Likewise, polluted stormwater runoff, which is already the number #1 pollution source in Puget Sound, will worsen. Additionally, the gap between affluent and underserved communities will likely continue to widen, resulting in greater social and economic inequities.

TRFF’s vision for this new Initiative was, in many ways, an extension of its previous investments in environmental education, grassroots leadership and water quality. However, the foundation’s overarching objective was to bring greater awareness to the connectivity between people and the places where they live, work and play.

PWI brings together people not typically at the same table to address persistent challenges and promising opportunities.

Communities of Interest

- **Active Transportation**
  Improving access to safe, healthy and affordable active transportation options

- **Agriculture**
  Supporting an economically viable and environmentally sustainable agricultural community

- **Forests**
  Protecting, managing and increasing forestlands from the mountains to the shoreline

- **Environmental Education**
  Creating learning opportunities that inspire a lifetime of discovery, connection and stewardship

- **Just and Healthy Food System**
  Creating an equitable food system that promotes healthy communities

- **Industrial Stormwater**
  Improving industrial stormwater management to protect the health of local waterways
To do so, PWI brings together people not typically at the same table to address persistent challenges and promising opportunities. It represents a broad coalition of businesses, nonprofits, government agencies and individuals to participate in working groups called Communities of Interest (COI). These teams focus their energy on specific issues including transportation, local food, natural resources, environmental stewardship, public health, social justice and much more. Each Community of Interest is open to anyone who wishes to join; and new groups can be established with enough interest and support from the community.

Formation and Funding

Prior to the official launch, TRFF conducted extensive research on how philanthropy dollars be strategically invested to catalyze community-centered change. After hundreds of community interviews, the idea of using the watershed as an organizing principle emerged. Next came an examination of four watersheds that are critical to Puget Sound and the selection of one – the Puyallup Watershed – with ultimate hope of creating a model to share with other watersheds throughout Puget Sound and beyond.

TRFF also convened a community advisory group to help design the building blocks of the Initiative. The group included both environmental leaders from the watershed along with a wide range of grassroots leaders representing youth, the arts and social justice sectors. Also included was a range of local stakeholders including: farmers, business people, tribal leaders, sport fishermen, scientists, educators, and government officials.

In 2012, TRFF officially announced the start of the Puyallup Watershed Initiative by making a 10-year funding commitment at $1 million per year. However, TRFF intentionally left the long-term vision for the Initiative relatively open and invited community partners to define their own agenda. This decision marked a departure from traditional grantmaking models, which tend to focus on narrowly defined challenges and work with well-established partners. Instead, the PWI would look to the community for a sustainable vision of the future and an action plan for how to achieve it. Creating space to collaboratively define and ratify priorities is a cornerstone of community democracy (Hanson 2005) and a key underpinning of the PWI.

The first year of funding, in 2013, was dedicated to the establishment of COIs through a partnership with Bonneville Environmental Foundation. The response was encouraging and significant. Eleven groups stepped forward with proposals, each one a self-organized* team of individuals, public agencies and professional organizations that share specific concerns about the health of the watershed. After an initial round of evaluation, eight groups received funding to conduct strategic planning and, ultimately, seven groups

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**PWI Guiding Principles**

1. Increase community stewardship
2. Strengthen local leadership
3. Improve water quality
4. Ensure equity and inclusion

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*PWI Guiding Principles*
advanced to receive funding over multiple years, provided they demonstrate satisfactory progress against stated goals.

The COIs conducted strategic planning over a 6-to-12-month period. The timeframes varied based on the scope and complexity of the subject matter and the size of each team. Group members would meet periodically, then assign specific follow up tasks (e.g., research, peer group interviews, community outreach) before reconvening. With the data and insights they gathered, each team developed a 20-year vision, 10-year strategic plan and their first-annual work plan to guide their efforts.

Shortly after completing their strategic plans, each COI was required to develop a working agreement to guide group efforts. The agreement, referred to by some as a Pledge, defined the structure of the group and outlined decision-making procedures. Initially, this work felt abstract and challenging to some COI members; but soon afterwards, as groups began to execute their plans, they came to recognize the value of defining their own governance and processes.

They saw how these working agreements helped ease tensions and confusion related to complex decisions, such as hiring staff and allocating funds. They also observed how working agreements helped orient new COI staff and members.

Notably, some COIs have relied upon their Working Agreements to guide the collaborative budgeting process, which requires group consensus. Traditionally, collaborative budgeting can be a lengthy and tense undertaking as group members determine how to allocate their limited resources. Not every project can be funded, which can lead to some disappointment. However, by following their Working Agreements, COIs made sure to solicit all points of view and explore alternatives before making final project funding decisions. This procedure gave people a well-defined method for how to handle their differences in a constructive, respectful manner.

In 2014, TRFF awarded $1.09 million in annual grants for the COIs to begin implementation of their plans. In 2015, $1.33 million of renewed funding was awarded; however, these funds were supplemented by successful efforts by several COIs to secure independent sources of support. The Active Transportation COI secured approximately $300,000 in grants from several private funders and government agencies. Additionally, the Agriculture COI won $200,000 in grants from the United States Department of Agriculture. These funding accomplishments represent a significant step forward because they demonstrate how the PWI can and will evolve into a financially independent, self-sustaining entity.

* The self-organizing process was facilitated through public workshops, informal gatherings and introductions.
Mobilization

The PWI is different by design. Instead of identifying problems and remedies from the top down, it brings together diverse viewpoints to develop solutions from the bottom up. Instead of concentrating on a few short-term projects, our members take on broad, systemic challenges. Instead of approaching problems in individual organizational silos, COIs tackle issues together.

The Communities of Interest are the engines of change. Together, they have established a robust public outreach and engagement program with activities taking place all year long. The programs run the gamut from local community gardens to broad public policy reform, but all map back to the PWI’s guiding principle of increasing community stewardship with an emphasis on equity and inclusion.

The COIs follow an inclusive, transparent and collaborative process in conducting their work. Each group is set up as an “open table,” which means they are willing to let anyone join their activities at any time. Monthly and/or quarterly COI meetings are open to the public. Likewise, sub-group meetings within a COI may be open to the public.

Current PWI Outreach and Engagement Efforts

**Advocacy**
- Farm to School Program
- Local Agriculture: “Pierce County Fresh” logo and outreach campaign

**Policy**
- Safe Routes to School
- Complete Streets Guidelines

**Stewardship**
- Farmland Conservation
- Stormwater Permitting
- Urban Greenspace Restoration
- Tree Planting Workshops

**Education**
- Forest tours
- Major Taylor Project: youth development program
- Teacher Workshops for Environmental Studies
- Landowner Engagement

**Community**
- Community Gardens
- Farmers Market SNAP User Workshops
- Community Forest Acquisition
The COIs widely share information about their activities through blogs, newsletters, websites and social media channels. These communications are a valuable means of both raising awareness for key topics and encouraging participation in events.

In 2015, TRFF began holding monthly meetings with representatives from each COI to help link and integrate their work. The COI teams now maintain a shared news and events calendar, which helps them coordinate activities and share resources or costs as appropriate.

Currently the PWI has both formal and informal mechanisms in place to promote feedback, learning and continual improvement. These various strands of evaluation work together to help COIs stay on track and correct course when necessary. Moving forward, greater standardization in reporting across Communities of Interest – especially in terms of budget, accomplishments and participation – will help promote transparency within groups and collaboration across groups.

Because equity is a central value of the Initiative, each COI is encouraged to develop some mechanism for feedback from stakeholders who are directly impacted by their work but may be underrepresented in the group – for example people of color, people of lower socio-economic status and businesses. External systems of accountability are also important – both for funders to justify continued investment and for the public to validate whether meaningful social change is occurring.

The PWI is grounded in the understanding that broad-based solutions take time to develop and even more time to take hold. Collaboration is the key to success. Therefore, we encourage listening, compromise and learning from each other in pursuit of shared long-term goals.

As COIs align and integrate over time, they will become a strong force that can influence the direction of policies, public opinion, funding and culture – including the personal practices of residents, the agendas of government agencies and large non-profit organizations and the business practices of developers and industry.

Group Dynamics

Community-centered change depends on two things: (1) compelling strategies; and, (2) supportive membership. Compelling strategies are fairly straight-forward: they enable community partners to make informed decisions about how to invest their time, energy, resources and social capital – and for how long. Membership dynamics, on the other hand, tend to be more complicated.

It is easy to imagine that all PWI members are hardworking volunteers who are selfless with their energy, ideas and influence (and that’s often the
case!); but experience tells us there is more to it than that. We have seen, and will likely continue to see, a range of behaviors that complicate group dynamics.

Consciously or not, some people may seek to exert power and influence over other for resources. Peers may exclude newcomers from full participation until they “come up-to-speed.” PWI has taken steps to preempt these types of scenarios so that anyone willing to contribute to the group can do so, unfettered. However, every organization experiences growing pains and we are no exception to the rule.

What outweighs these challenges is a shared desire to succeed. But that desire can only be realized if several “enabling conditions” are in place. For example, before much time is invested, the group needs to develop a well-defined purpose that members support with continued investment of their time. Also, there must be leaders who can articulate the shared vision of the group to funders and prospective partners. Contractors and consultants can be strategically used to accomplish specific tasks, but they cannot do the work alone. Some base level of participation is needed from members who have the experiences, knowledge and skills to advance the work. Additionally, the work should link to and leverage regional expertise and capacity.

Successful Communities of Interest

Several “enabling conditions” emerged as necessary for groups to realize early wins in collective impact

Leadership Characteristics

• One or more leaders were able to publicly champion a collective vision that extended beyond their individual and organization interests

• A cadre of leaders, representing different interests, who listened to each other and demonstrated a readiness to act on each other’s ideas

• One or more leaders willing to invest time and energy outside of meetings to advance the work and get prospective partners involved

Membership Characteristics

• Members had the capacity and support from their organizations to make a mutual investment of time and energy beyond the minimum of attending meetings

• Members were able to build consensus for a well-defined group purpose and individual roles relatively quickly

• Members invested time and energy into building each other’s capacity, for example through mentoring, training and peer-to-peer learning
Without these enabling conditions teams may still generate significant value, but will likely fall short of producing the broad and lasting social benefits they envisioned.

Looking back on cases where Communities of Interest did not take hold, there were significant differences of opinion about the group’s purpose and a lack of mutual investment in time and resources. These two challenges are interrelated since people are less willing to invest time if the purpose isn’t clear, and it can be difficult to explore what a shared purpose might be if people do not invest time.

The capacity to develop and implement the work collaboratively was also a challenge all COIs faced to some extent. Some groups developed a shared vision, but then found there was no one to operationalize the vision or implement the work – even when skilled people and funding was available. Often it boiled down to a misalignment of needs and bandwidth. In other words: the ability to line up the right people with the right project at the right time. Fortunately, with experience, COIs have learned to overcome these types of challenges.

COIs that have successfully gone through the growing pains of group formation are now able to advance innovative, broad-scale work, beyond what could be accomplished with conventional grant funding. Areas for improvement include establishing a stronger sense of internal accountability, expanding cross-COI collaboration and recruiting more community partners. Many members are committed to reaching out to diverse partners in the watershed that, historically, have been excluded from the mainstream environmental movement, such as people of color, people of lower socio-economic status and businesses.

Independence

In early 2016, work began on designing a community-owned and centralized governance structure for the Initiative, which will provide operational support services, such as fundraising, communications and coordination. Likewise, it will assume the power and authority over TRFF grantmaking, which is currently about $1.3 million annually. This future governing body is hoped to become independent during the next phase of the Initiative and self-sustaining before the end of TRFF’s 10-year commitment.

In order for this “Transition” to be completed, there must be agreement among all stakeholders as to how the PWI will function in the future. To achieve this consensus, the following steps are being taken:

• **Organizational Values and Governance “Focus Groups.”** Four focus group sessions were conducted in April 2016 to gather input regarding the design of a “Community Board” for the proposed new community-owned PWI. Results are currently being summarized.
with the help of an advisory board of 19 colleagues representing each of the COIs. Next, in summer 2016, preferred models for governance will be presented to the larger PWI constituency for final refinement. The goal is to identify and recruit new PWI board members by the end of 2016.

• **Develop Capacity of COI Coordinators.** We envision an organizational structure that employs full time coordinators, working 90% for the COIs, and 10% for the PWI as a whole. The coordinators would be hired and supervised by the COI members, with their salary’s coming from the annual COI budget allocation.

• **Organizational Structures.** We will explore a range of organizational structures for PWI self-governance. To aid us in this effort, we will seek input from Philanthropy Northwest, The Greater Tacoma Community Foundation, the TIDES foundation and others regarding the most promising options.

Assuming everything goes to plan in 2016, we expect to have a new PWI organizational and governance structure in place in 2017.

**Sustainability**

For those engaged in the Initiative since the beginning, many would agree it is a rich learning experience. All COIs have experienced the internal “push-pull” politics of building consensus, especially when funding has been at stake. However, each group has found its way forward with their individual working agreements and shared facilitation support structure.

Individuals and organizations have also benefited greatly from peer-to-peer learning and exposure to new concepts and skills through training opportunities. The mutual investment of time and energy to get this far has been substantial, but in most cases, people feel it has been work worth doing.

PWI was conceived to grow and evolve based on collective experience. In other words, we are learning as we go. As the broader field of philanthropy looks to this effort, there are important lessons to be shared about what it takes to achieve a sustainable community-led movement.

• **Clarity** – A well-defined purpose creates enough transparency – acting visibly, predictably and understandably – such that members can easily identify if their interests align with the funder’s vision and make informed decisions about how to invest their time, energy and social capital.

• **Alignment** – Building relationships and convening stakeholders are often familiar roles for foundations. However, helping to create alignment for a common agenda requires a slightly different set of
skills and positioning with respect to community partners. Inspiring a sense of shared accountability among members of a collaborative group is even further from traditional philanthropy roles.

**Accountability** – In the same way that a culture of transparency can feel awkward to some, the idea of broad accountability can be very intimidating to others. Answering to your own team is one thing; being held accountable to a collective group is much harder. Fostering healthy, supportive group norms are critical for growth. Equally important is establishing a culture and common practice of feedback and reflection at all levels so that learning is applied to practice.

**Decision-Making Protocols** – All COIs have completed what we refer to as their “Pledge,” which functions as a set of bylaws to guide team interactions. With this guiding document, some COIs operate very efficiently; however, others still struggle at times. Ongoing monitoring and coaching may be necessary to help some COIs to operate efficiently and consistently.

**Diversity and Inclusion** – The current participant pool does not represent the demographics of the watershed. Recruiting a more diverse membership into the Initiative will be a long-term focus and struggle. Numerous strategies will be in place in 2016 in hopes to create new pathways for broader participation.

**Social Networks** – Strong social networks are an important component of resilience and, therefore, central to a successful community-centered change efforts. It is important to track the growth and development of social networks throughout the lifecycle of the Initiative. Likewise, it is critical to assess the extent to which people make new connections, build lasting relationships and strengthen social ties in ways that inspire action.

The work of the PWI is far-reaching and may sound risky to some because there are many unknown factors. Yet those are the very reasons why we are willing to support community-centered change. After all, if there were simply technical solutions to the challenges we face, then they would have been solved long ago.
For 35 years, the Greater Tacoma Community Foundation has built a deep understanding of Pierce County, which gives it the unique ability to link community stakeholders and causes.

APPENDIX

Fiscal Administration

Greater Tacoma Community Foundation

In order to improve social and environmental conditions throughout the watershed, the Puyallup Watershed Initiative (PWI) relies upon its working groups called Communities of Interest (COI). These teams focus their energy on specific issues including transportation, local food, natural resources, environmental stewardship, public health, social justice and much more.

The COIs were established in 2013 and quickly began work on their 20-year visions, 10-year strategies and annual work plans. These organizational efforts were intense and time consuming. Large teams made up of members from various backgrounds (e.g., individuals, public agencies and professional organizations) had to be organized and mobilized. As tasks were laid out, the right COI members had to be matched with the right assignments.

Against this backdrop, it became clear that asking each COI to assign a Fiscal Lead organization to administer its grant money would likely be challenging. The relationships and levels of trust built through the COI formation process were new and fragile. The Fiscal Lead decision might threaten or undermine these vital collaborative building blocks as issues of capacity, equity, efficiency and power arose during deliberations.

These concerns proved to be accurate. As time passed, only two COIs were able to identify a clear Fiscal Lead option.

The Initiative leadership team realized that it needed to alleviate the pressure that COIs were feeling around the Fiscal Lead decision and allow them to refocus on their work.

To address this need for a Fiscal Lead, the PWI sought out a partnership with the Greater Tacoma Community Foundation (GTCF), which is considered (by The Russell Family Foundation) an anchor institution in the region. GTCF is a citizen-led public nonprofit that helps people and organizations advance the causes they care about. For 35 years, it has built a deep understanding of Pierce County, which gives it the unique ability to link community stakeholders and causes. It is home to more than 450 individual funds, holds more than $112 million in assets and has distributed more than $97 million in grants over the last 33 years.

GTCF was named the Initiative’s fiscal administrator in 2014. Its role is to manage legal due diligence, grant awards and checks, and collect grant reports for the COIs.
However, GTCF is much more than an administrative partner. Drawing from its deep experience in the region, it has become a valued thought partner with the Initiative leadership team.

**GTCF Partnership**

- **PWI Master Designated Fund:** GTCF maintains a master “Puyallup Watershed Initiative” designated fund to administer grants for the Initiative.

- **COI Designated Funds:** GTCF oversees designated funds for each COI. Grant money is transferred into a COI’s designated fund upon approval of specific proposals. Currently, The Russell Family Foundation’s board of directors approves COI proposals. In the future, that responsibility will shift to a new centralized governance structure for the Initiative.

**Commissioned Research #1**

**The Value of Networks – As Measured by Social Network Analysis**

Addressing long-term challenges, such as those being addressed by the Puyallup Watershed Initiative (PWI), requires considerable expertise and bandwidth. Often, the scope and scale of work is beyond what a single organization can do by itself. For this reason, networks, coalitions and partnerships are gaining in importance as critical components of systemic change efforts.

Philanthropies, nonprofits, and other groups that are interested in collective action frequently employ network formation and growth as a cornerstone strategy. They also take steps to evaluate the health, impact, and durability of these networks in order to understand and maximize their value. The Russell Family Foundation worked with ORS Impact (http://orsimpact.com/network-evaluation/) to assess the emerging PWI network and identify ways they could foster its development.

ORS Impact began by compiling baseline data about the PWI members via an online survey. This was followed by a social network analysis to create a visual map of how the individuals in the communities were connected to each other, and how their relationships had changed in the last year. Establishing a comprehensive database of stakeholder metrics as well as detailed visualizations of their relationships and interactions, enabled the PWI to explore key questions, such as:

- Has involvement in the network caused new connections to form? Are they strong?
• How sustainable are the connections? Do we think they will be long lasting?
• Who are the leaders? Who is most active in the network? Are they the same people?
• Are there people who are more likely to inspire action?
• Who is working collaboratively among the sub-networks?

The maps below illustrate how the PWI network has matured over time with the emergence of recognized leaders and a greater number of connections among members.

Sample Social Network Analysis Findings for the PWI

Baseline network of relationships

After one year of PWI participation
Identified inter-network collaborators

Commissioned Research #2

Building Capacity for Equity
One of the guiding principles of the Puyallup Watershed Initiative (PWI) is ensuring equity and inclusion. The reason for this is simple: with more community participation, the greater our odds of success. Also, teams with deeper experience confronting the challenges of equity and social justice are better equipped to take on these systemic issues.

Currently, each of our Communities of Interest (COIs) are reaching out to enlist more community partners. A key focus for them is to enroll more people of color and more participants from lower socio-economic backgrounds.

However, while these COI recruitment efforts gain momentum, the level of COI program work concerning equity and inclusion is still in its infancy. This
is because the COIs are still building an understanding of equity programs and leaders throughout the watershed. In other words, they need to increase their knowledge base and develop relationships.

To accelerate that process the PWI commissioned a “landscape study” of the equity initiatives across the Puget Sound region. The findings will help guide the COIs in tackling a range of issues related to their long-term strategies.

Our landscape study was conducted from February through April 2016. Telephone interviews were conducted with 40 individuals from various communities of color, community-based organizations, government agencies, faith groups, arts organizations, academia and funding organizations. From these discussions, we learned that there are many vibrant and innovative programs underway. Better yet, we discovered there is strong interest among equity program leaders in working with the PWI.

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<th>Interviewees’ Equity Efforts</th>
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<td>Leadership Development</td>
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<td>Police Brutality</td>
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The landscape study revealed a wide array of programs and structures that address equity concerns in different ways. At the same time, our research uncovered some core similarities about the ways the work gets done. These findings reveal important philosophical and operational compatibilities with the PWI.

- **Fostering community engagement, leadership development and community voice**
  Focus on engaging the community to identify barriers, problem solve or gather insights to community interests

- **Increasing access to resources**
  Focus on providing access to services, resources and equal opportunity
• **Changing structures**
  Focus on public policies, structural racism and social justice

• **Fostering partnerships and collaborations**
  Focus on shared interests such as education, economic opportunity, public health, etc.

The study probed for key foundational information about the goals and methods of equity programs. When respondents were asked whether they were doing any work around environmental equity, slightly more than half said no. However, the rest said yes. Of these, 17.5 percent described their work as primarily about environmental equity. Another 12.5 percent said their work was partially linked to environmental equity. The remaining 15 percent said their programs contribute to environmental equity, but are not perceived that way because the “green” benefit is indirect. For example, these programs center on things like greater access to public transportation, reclaiming abandoned urban space for public enjoyment, and LEEDS standard public housing.

Survey: Does your work involve environmental equity?

- None 55%
- All 17.5%
- Some 12.5%
- Related but not thought of as environmental 15%

Based on these results, we have concluded that environmental equity holds great promise for partnerships between community groups and PWI. Taken as a whole, these types of programs align well with the strategies of each of the COIs.

Looking forward, we hope to combine our collective knowledge, networks and resources to achieve far-reaching collective impact. And through our initial efforts with environmental equity, we expect to gain experience that be used to improve equity on a wide range of issues throughout the watershed.