

DOCUMENTING THE PUYALLUP WATERSHED INITIATIVE

Perspectives From Today, A Strategy For The Future



Prepared For
The Russell Family Foundation

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WHEN THE RUSSELL FAMILY FOUNDATION asked Fern Tiger Associates for assistance in thinking through how best to document its emerging 10-year Puyallup Watershed Initiative, we were immediately attracted by the vision, ambition, and philosophy driving the project. We also appreciated the challenge of the proposition and how much intellectual and creative energy would be necessary to craft a comprehensive and expansive, yet executable plan for documentation.

About a decade ago, Fern Tiger Associates was asked by another foundation to prepare a qualitative “story” of their 10-year initiative — but that request was made in that initiative’s eighth year. While we prepared a very powerful and inclusive publication — complete with a factual history, objective and analytic observations, and compelling narratives of inspiring local activists — it was clear in some cases that something had been lost over the years. As we interviewed participants, they were recounting campaigns, organizing efforts, and struggles well after the fact, and often after the participants had moved on from the project. In reality, this was a story of herculean efforts by hundreds of people, working individually and collectively, in regional campaigns that addressed race relations, economic inequity, access to education, and other hot button social issues. As the de facto historians of this effort, we needed to ensure that all perspectives were included; we needed to understand how the project evolved over time; and we had to put all of the information into a contextual perspective.

Oh how we wished we could have been on-the-ground over those previous eight years!

When we began that project, we thought that the story would primarily be about the passion of the grantees. And while that was certainly a key component, we found that the other side of the story was equally compelling. As we met with those who helped to shape and guide the thinking of the Initiative — staff, board, advocates, funders, researchers, and statewide and national leaders in the field — we were drawn to the drive and passion that it takes to move an enterprise like this forward.

Through the years, FTA has worked with varied partners on comprehensive evaluations and narrative projects to help reposition and restructure institutions, confirm the efficacy and success of programs, or document the history and impact of individual organizations as well as regional associations and government agencies. It is with this experience in mind — combined with the past several months of intense research, observations, and interviews with key stakeholders in The Russell Family Foundation’s Puyallup Watershed Initiative — that we submit the following recommendations for this documentation project.

Our recommendations include a wide range, and a broad definition, of “documentation” — from polling to archiving to storytelling to the creation and dissemination of traditional print materials to interactive or online ‘soft’ information.

It is important to note that given the broad way in which we discuss “documentation” in this report, there is a good degree of overlap with what is typically considered “communication planning” and even “civic engagement.” This report addresses potential audiences, final products, and delivery methods that should ideally dovetail with a comprehensive Communication Plan (and potentially an active community engagement plan) for the Initiative and the Foundation — which is noted throughout the following pages.

Since the Foundation might use parts of this document in a Request for Proposals for potential consultants to perform the desired documentation, it should be noted that we consider portions of the “Collect” and “Analyze” sections to be “work product” — revealing to some extent the style, process, and deliverables that FTA would most likely put into its own response to such an RFP or RFQ, and thus should be considered confidential.

This report is divided into four main sections:

- **“The Start-up Years”** provides an overview of the PWI itself and explains why the Foundation believed a significant investment in a unique structure to impact environmental changes in one watershed was appropriate and worthwhile. It also addresses some of the challenges faced by the Foundation in the earliest decisionmaking stages of the Initiative and includes quotes garnered through the many interviews conducted during these past months.
- **“Findings and Observations”** provides an overview of perceptions and salient quotes revealed through more than 40 one-on-one interviews from a cross-section of people who live, work, and play in the Puget Sound region. The interviewees include key internal and external stakeholders in this Initiative as well as those who have had or continue to have some relation to the Puyallup Watershed, yet have little-to-no knowledge of the Initiative.
- **“A Strategy for Active Documentation”** provides a comprehensive, linear look at the rationale and process for documenting the Initiative from this early stage, including specific thoughts on what information to collect, how to collect it, and how to organize and analyze the subsequent wealth of data that will be collected. This section is comprised of six discreet but interconnected parts: Collect, Analyze, Translate, Create, Disseminate, and Engage. This section also describes how to address external factors, parallel efforts, and other types of “elusive evidence.”
- **“Appendix”** includes charts and graphics to simplify and illustrate the proposed documentation process.

The Puyallup Watershed Initiative has emerged as a unique, hybrid approach to a rather traditional goal — bringing a wide range of communities together to create common agendas in order to protect and preserve the Puyallup Watershed so that cleaner water enters the Puget Sound. Over the course of the Initiative’s ten years, individuals and organizations will come and go, evolve and strengthen, succeed or transition to other projects. Hopefully, this process will allow them to bring forward an understanding of the great potential for collective impact through strategic collaboration. And, if properly executed, this documentation project will capture that potential.

We are grateful for the opportunity — at this early stage — to have met so many thoughtful people through the interviews and for the chance to be a part of the Puyallup Watershed Initiative.

Fern Tiger Associates

POSTSCRIPT

As the staff at Fern Tiger Associates gathered information regarding The Russell Family Foundation’s (TRFF) Puyallup Watershed Initiative (PWI), several thoughts that were not directly related to documentation emerged organically from the interviews and research conducted over these past months. We felt that these thoughts — many of which relate to communications that are tied to, but separate from, documentation — should be captured and shared with the Foundation as areas of note from our perspective as neutral observers. These thoughts follow.

We believe the Foundation should:

- create an overarching communications plan (which includes basic messaging, a social media and media relations strategy, outreach and dissemination plans, etc.) as a critical addition to connect documentation with a wide variety of interested parties (across COIs and beyond the Initiative). This could help COIs and others external to the Initiative better understand the Foundation’s intentions and build a consistent groundswell of support for the work ahead.
- confirm and articulate the Foundation’s rationale for a ten-year funding window, to enable the broader community to better understand the scope of the Initiative and its place within the Foundation’s broader mission.
- confirm and articulate the overarching short- and longer-term goals for the Initiative, and acknowledge that these goals may be broader than the Initiative itself and those of the individual and collective COIs — such that the whole of the PWI will be greater than the sum of its parts.
- articulate how the Foundation’s goals are simultaneously environmental and social, and seek to build community capacity and expand political will.
- fund the development of communication and outreach tools and training for COIs. The Foundation can build consistency in the Initiative by developing templates and graphic materials (as well as a strong online presence) that can be adapted by COIs but which enable the whole to be grasped over and above the individual parts.
- provide for the development of an Initiative-focused interactive website to both collect information for documentation and also disseminate information to key audiences. This can be included within the contract with the documenting agency or through engagement of a different professional firm to develop this project independently (as long as there is a tight connection between the firms so that the website is designed to collect as well as to disseminate information).
- consider the value of developing an identity for the PWI.
- assess and provide training for COIs in areas such as fundraising, organizational development, etc. and guide COIs to ensure long term sustainability of the organizations as needed — allowing each to grow and mature, merge as appropriate, and learn from each other at appropriate points in their development.
- consider a “curriculum” for the Board to build an internal working knowledge base and awareness of both the Puyallup Watershed and collaborative grantmaking — to gain a deeper understanding of the relevant issues — environmental, social, political, and other. This could potentially become a focus at each Board meeting.

EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

From the decision to address the water quality of the Puget Sound through community capacity building, to the requirement that grantees work in collaborative Communities of Interest, to the selection of the most geographically and demographically complex watershed as a focus — The Russell Family Foundation’s ten-year Puyallup Watershed Initiative (PWI) has been simultaneously a logical next step for the Foundation and an exercise in bold and innovative thinking.

In order to appropriately capture and leverage the wealth of information generated by this Initiative over the next decade — not only as a historical record, but to maximize the efficacy and efficiency of the PWI — an equally logical, bold, and innovative documentation effort is recommended.

Goals

By launching this 10-year initiative, The Russell Family Foundation is earmarking a significant portion of its time, energy, and resources for this program for the next decade. Just as important, however, is the fact that TRFF — a trusted partner in the community who is invested in the region — is placing its reputation front and center to follow through on its promises.

The following report prepared by Fern Tiger Associates recommends an ongoing, iterative, and interactive ‘Active Documentation’ process that will:

- create a historical record of the Initiative;
- allow for real-time, highly-informed decision-making and potential course-corrections as the Initiative evolves;
- encourage support from key partners based on useful and dynamic information — including potential co-funders for the PWI — and inspire commitment to related efforts, locally, regionally or nationally; and
- embody the Foundation’s commitment to transparency, and community accountability, and expand on TRFFs effort to be a constantly learning and evolving institution.

Customized Approach

The recommendations related to documentation have been crafted specifically for this Initiative based on core findings derived from an exhaustive examination of The Russell Family Foundation’s (TRFF) efforts to date on the Puyallup Watershed Initiative. This includes more than 40 in-depth, in-person interviews with internal and external stakeholders as well as independent research on the relevant grantmaking and programmatic fields. These findings, as well as an overview of the Initiative’s start-up years, are included in this report to lay the groundwork for the recommendations related to documentation.

Active Documentation

This project is intended to be an ongoing and iterative process, distinct from an after-the-fact, ‘static’ approach — such as more traditional Foundation reports or programmatic evaluations. Incremental progress reports as well as consistent feedback and analysis of decisions and actions will provide real-time information to inspire and inform staff and allow for nimble response to emerging issues. It is hoped that the results will have a broad spectrum of uses in the programmatic,

communication, development, and philanthropic arenas.

There are six primary and integrated actions in this Active Documentation approach:

1. **Collect:** Define the scope and structure of the data as early as possible. Establish the key avenues of information, the methods of collection, and a system of organizing and archiving the information.
2. **Analyze:** Independently analyze the data, cross-referencing and assessing within various contexts (including parallel efforts; political/policy landscape; social change theories, etc.).
3. **Translate:** Craft information into audience-appropriate “content packages,” including narratives, organizational histories, timelines, network maps, charts, key facts, findings, polling results, etc.
4. **Create:** Assemble content into products in various formats — including print, video, online content, presentation media, etc. (dovetailing when possible with communication documents).
5. **Disseminate:** Identify key audiences and disseminate to key audiences. The frequency, format, and content of these products will reflect the information needs of each audience.
6. **Engage:** A strong community engagement strategy can inform the documentation process through authentic community participation.

Complexity and Breadth of Information

This process captures quantitative and qualitative information — the who, what, where, and when; the how many and how much; the hard data and the day-to-day information that can get lost over time. Given the size of the watershed and the myriad

categories of quantifiable information to be gathered (environmental, demographic, budgetary, electoral, etc.), a clear and early prioritization of data and a comprehensive archiving system is critical.

Given the multiple organized efforts in the region that will simultaneously be impacting water quality and other factors (such as local policy efforts, community engagement, public opinion, etc.), the greater context of this information needs to be consistently incorporated into the documentation process. Given the emphasis on community capacity building as a means to affect positive environmental change, this process will need to track ‘soft’ (or ‘intangible’) information—including personal stories of those involved, relationships and partnerships, as well as significant shifts in local policy, public opinion, or media coverage to name but a few.

Focus Areas

In order to organize the process of collecting and analyzing such a broad range of information, this strategy identifies five overlapping Focus Areas:

- *Environmental Quality* (indicators related to the water quality of Puget Sound)
- *Community Capacity* (degree of leadership, social infrastructure, and organizational sustainability)
- *Social Impacts* (behaviors and attitudes of local communities, affected industries or business sectors, Community of Interest members and constituencies, as well as the political and regulatory environment)
- Public Awareness (knowledge of the PWI and environmental issues directly impacting Puget Sound)
- *The Puyallup Watershed Initiative* (internal structure, processes, decisions and decision-making, activities, perceptions)

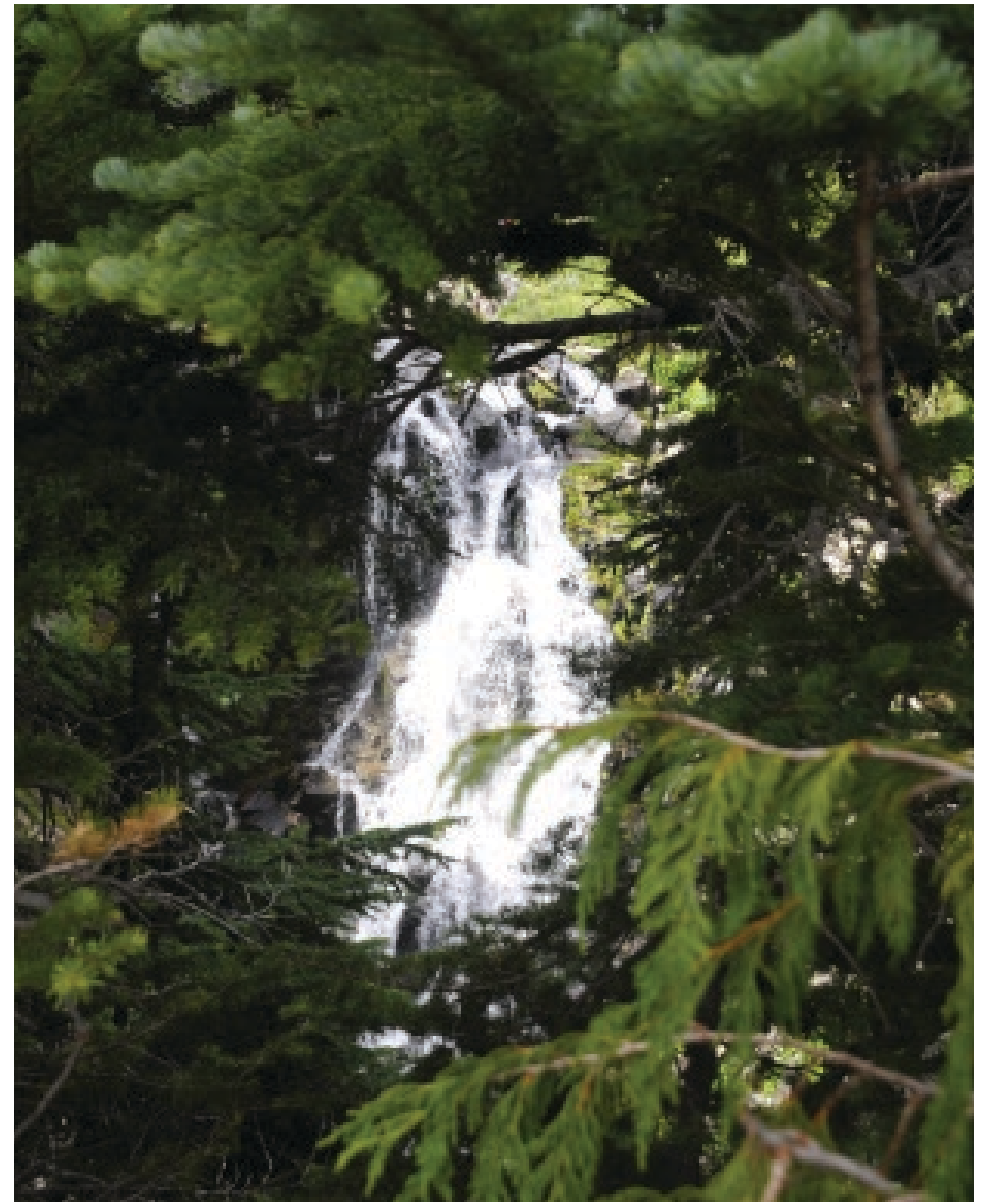
Communication Intersection

The ongoing products of this documentation effort should be able to be re-purposed into persuasive communications targeted at key audiences — including local communities, core COI constituencies, and potential programmatic and funding partners for the Initiative. This requires early and comprehensive coordination between this documentation process and any Communications Plans for the PWI and TRFF in general.

Documenting Agency

Finally, to achieve the desired ends, it will be critical for the documenting agency to be at once external (to ensure the ability to collect the most unbiased quantitative and qualitative data), yet highly engaged with the Foundation, the Initiative, the community, and the COIs (to ensure full knowledge of the internal workings of the Initiative team, their goals, intentions, and strategies). The documenting agency should possess a broad suite of professional analytical and research-based skills, but also creativity, passion, understanding, flexibility, and a deep sense of commitment to this project and its ultimate goals

THE START-UP YEARS OF THE PWI



“...if we cannot find resolution, balance, and accommodation for complex issues in specific places, is it possible to find these things in the larger social and political landscape of America?”

*-- Peter Pennekamp
Philanthropy and the Regeneration of Community Democracy*

The Russell Family Foundation’s Puyallup Watershed Initiative (PWI) is nothing if not ambitious.

In the most basic terms, the project’s ultimate goal is to improve the quality of water entering the Puget Sound. To achieve that goal, however, the Foundation has adopted an atypical and long-term strategy to invest in local leadership, foster collaborative partnerships, and support broad environmental education efforts. For a local foundation with a history of traditional funding within the Puget Sound region, this initiative is simultaneously a logical next step and also a major leap of faith.

Designed to support community-led, coordinated efforts to protect and preserve the local watershed, the PWI strategy covers a programmatic landscape as vast as the watershed’s geographic expanse. In announcing this project, The Russell Family Foundation (TRFF) has committed to a 10-year grantmaking initiative addressing a region of more than 1,000 square miles by funding multiple programmatic areas. Committing to this effort has meant creating wholly new internal structures and practices amid significant staff transitions in the start-up period.

Yet, while the premise of this project is ambitious, the process that led the Foundation to the PWI has been deliberate and well thought-out — a long journey on a path being forged in real time and being taken one step at a time.

The Path to Puyallup

“This Initiative is an effort to try to protect the waters of Puget Sound by going further upstream — to the terrestrial landscape... We have begun to acknowledge the importance of the shorelines and the people along the shorelines and further upstream that determine what goes in the Puget Sound.

– Internal

By launching this 10-year initiative, The Russell Family Foundation is earmarking a significant portion of its time, energy, and resources for this program for the next decade. Just as important, however, is the fact that TRFF — a trusted partner in the community who is invested in the region — is placing its reputation front and center to follow through on its promises.

The Puyallup Watershed Initiative truly began about five years ago, when the TRFF Board

started to question the impact of their grantmaking. In late 2009, the Foundation was continuing with a pattern that was described by one stakeholder as “funding all things Puget Sound.” While some Board members felt strongly that the Foundation’s diverse smaller grants were having a real impact on people’s lives, others disagreed. Some “didn’t feel the Foundation was making a big enough difference in the region.” As one Board member said, “When you give a lot of grants over time, you are doing some good things ... but in the end, it’s a scatter-shot approach.”

After much deliberation, the TRFF Board decided to make a significant shift to move from a more traditional form of grantmaking — what might be called “transactional” or “responsive” grantmaking, where grantees approach a Foundation with fully formed concepts and programs. Going forward, TRFF would adopt a “transformative” brand of philanthropy, concentrating on a more long-term grantmaking approach. The goal was to create a greater, more lasting impact through proactive and coordinated philanthropy.

In prior years, according to one interviewee, “there had not been a strong connection between what the programs were planning and where the Foundation as a whole was going. Now, the program goals and the organizational goals would be synchronized.” So, while the Foundation would continue to focus on the Puget Sound, it would begin to focus its attention on a key factor — the ‘human footprint’ and its impact on the Sound’s water quality.

Building a Strategy

“Instead of funding hundreds of groups independently, find out which of these groups have shared objectives — and do your best to facilitate that alignment wherever possible.”

– External

Once that step was taken, the transition had formally begun. The Foundation decided to further narrow its focus on the continuum of human influence along one particular water source — a local watershed.

It was with this mindset that the Foundation entered into a year-long process to choose which local watershed would be at the center of its new grantmaking initiative. TRFF Board and staff reached out to local leaders, forging new and vital relationships with members of the many communities who affect and are affected by each watershed under consideration – including environmentalists, farmers, and fishing communities, as well as regional water-focused activists, government representatives, university professors, and social scientists to name but a few. Staff, together with a team of consultants, began multiple site visits throughout the region, met with key players, and examined the myriad factors at play in the region.

From the beginning, though, the TRFF Board realized that “a perfectly healthy watershed within a decade” was not a realistic goal given the vast resources that would be necessary. Rather, the Foundation leaned toward basing its effort on building community capacity — aiming to facilitate powerful community-defined collaborations, unified by a collective vision for the watershed — ultimately

hoping to create greater and potentially more lasting collective impact on the region. And its plan was to achieve this through self-defined “Communities of Interest.”

Expansive in theory, the Foundation knew this would be difficult in practice. As TRFF continued its exploration of watersheds, the strategy for collective impact began to take shape internally. The Foundation saw the opportunity to fill a need in the region and in some cases “nurture individual seeds and start to align them.” The Communities of Interest structure facilitated the alignment of individual groups with shared objectives.

While these conversations were happening internally, however, the community began to take stock externally. “They want to make a long term impact, a positive impact, on the watershed. And we do too,” said one activist about the early stages of the Initiative. “But we didn’t know how to do that any better than the Foundation did at that time. Yet everybody had to start thinking ‘What does this mean and how does this affect my organization? What do we all need to start doing?’ And so we began trying to figure out how this can work. I think we’re still at that stage — trying to figure it out.”

One stakeholder said the biggest concern he has heard from the community is that the Foundation will spend a lot of money “navel-gazing,” while another said simply, “I fear they will just change their minds and go away.”

A Tough Choice...

“The four watersheds we looked at were incredibly different. Nobody went into this thinking that the Puyallup was an easy pick and that success was assured, or that a pathway was clear. The Puyallup presented significant challenges over the other options — and also significant opportunities.”

– External

After seven months of strategic preparation, community outreach, and deep research into the opportunity to make a difference in the region, the Board was presented with robust summaries of four watersheds to be considered for the grantmaking program. This presentation included images, maps, and statistical and narrative profiles of the watershed regions along with the possible investment benefits, factors for success, and the potential outcomes that might follow a ten-year philanthropic investment in each watershed. The decision was far from simple as the four watersheds under consideration — Skagit, Green, Hood Canal, and Puyallup — were incredibly different from one another. Each posed distinct challenges and each was home to a community eager to partner with the Foundation in this initiative.

Eventually, the choice narrowed between the Puyallup and Hood Canal. By all accounts, the Puyallup Watershed represented the greatest challenge in a number of respects. It was the most populous, the most diverse, and the most complex of the watersheds under consideration.

The variables ranged from the full spectrum of industries (representing almost every type of land use imaginable) that impacted and were invested in the watershed — from timber, to salmon, to shipping, to farming, to residential and commercial development; to the multiple regulatory jurisdictions that govern various aspects of the watershed; to the fluctuating political climates within the various municipalities in the region. Ultimately, the Board — with strong support from the Executive Director — selected the Puyallup.

All told, the Puyallup Watershed area comprises 11 cities and two counties, and intersects with the lands of both the Muckleshoot and Puyallup tribes. And with several different counties and jurisdictions in play, the political landscape is just as complex as the watershed itself. “It’s very political, it’s very conflicted, it’s got lots of land use regulations,” said one long time activist. Many cities along the Puyallup River have aggressively pro-development elected leaders whose primary concerns are boosting the local economy. Further down river, urban centers struggle with shifting water boundaries and environmental justice issues. And then there’s storm-water and non-point polluting issues, which manifest very differently upstream than they do downstream. All of these issues exist simultaneously within the Puyallup Watershed. And while creating a coordinated effort in this context may seem daunting, it is vitally important. “Economic development traditionally stands in the way of environmental protections,” said one watershed expert. “And if you think about where development is going, it’s not a pretty picture. So the only pathway that holds much

promise is to find ways to actually collaboratively work with all of these entities — because that’s got to happen, no matter what.”

TRFF understood that forging a common agenda among the Communities of Interest that would emerge from the Puyallup would be no small feat. Small organic farmers, for example, have very different priorities than larger, more traditional farmers. And the potential differences in the land use priorities between farmers and floodplain activists could be greater than their similarities. Salmon and fishing-related issues are priorities for many local tribes as well as commercial fisheries — although those can diverge along key decision points as well — while access to and preservation of parks and trails are prominent concerns for residents, especially in the urban areas of the region.

“It was widely acknowledged that this was exciting because the Board had a commitment to ‘this place.’ But in terms of the NGO infrastructure it was incredibly lacking. There was a huge void in terms of what this program can, or should, look like.”

– External

...Yet a Clear Choice...

“The Puyallup presents an opportunity to really learn and really invest. I think it’s also a little bit more complicated and a little bit more interesting than other watersheds where you don’t have the diversity of stakeholders and interests. They’re kind of monotone. Here, you’ve got a tremendous amount of diversity.”

– External

Ultimately, however, the choice to focus the 10-year Initiative in the Puyallup Watershed was made not in spite these complexities, but in many ways because of them. Other watersheds under consideration would likely have proven “easier” — easier in

terms of working with existing organizations; easier in terms of opportunities to make quicker, demonstrable impact on water quality; and easier in terms of a less complex regulatory landscape. However with minimal infrastructure in place and with a perceived void in leadership, the Puyallup also presented a “cleaner slate,” as one activist put it, “without decades of baggage, and inertia, and institutional competition among strong and well established NGOs.”

For the TRFF Board, the demographic and social breadth of the Puyallup was perhaps its most attractive and compelling feature. In many ways, the Puyallup represents the chance to create a social impact as great as any environmental or scientific impact that might be achieved through the program. And it will be those social impacts that will be needed in order to continue the work well beyond the ten year commitment of the PWI. “The game is won and lost in the places where people live,” said one invested participant. “If you can’t completely fix an urban watershed, you’re at least making a difference in someone’s backyard.”

Of course, another factor in selecting the Puyallup was the fact that this region is, in fact, home to the Russell family and The Russell Family Foundation.

Building Communities

“The notion is that if we believe that folks need to get together, they need to define their issues. And then there’s a need to build bridges across those thinking patterns in order to get a more holistic plan about the watershed... That’s not going to happen left to the natural inclinations of people.”

– Internal

In September 2011, shortly after the decision to select the Pullayup was confirmed, a community convening was held and the decision was officially announced. The event was attended by young philanthropists, tribal representatives, academics, farmers, teachers – a group crafted intentionally to break the mold of the traditional environmental activist community. Similarly in 2012, TRFF established a short-term PWI Advisory Group. The composition of this group was also strategic in its diversity (a factor not generally considered in

environmental efforts, other than those focused on environmental justice). These groupings brought together thinkers and influential community members from diverse disciplines and communities. They were designed to be as open and inclusive as possible, reflecting both the need for the Initiative to break the mold of traditional environmental activism and to generate as much local support for the Initiative as possible. Moreover, this approach was reflective of the Foundation’s goal of opening the conversation to wider participation. For some, this was a refreshing change of pace; for others, this eclectic mix of people provided little substance and

“There’s something nostalgic about this being the place where George Russell founded his company and continued to invest in and support. It’s the place where the funds were generated. And a connection to the founder’s heartbeat had something to do with it.”

– External

clouded the ultimate purpose and strategy of the Initiative.

“The Foundation was determined to bring in these seemingly totally random people to the table,” said one stakeholder discussing the early process. “They would convene this stakeholder group and have these dinners where they brought in community leaders from the arts and economic development — very, very different folks. And some of us thought they didn’t have anything to contribute to the end product — or were potentially even at odds with the best environmental outcomes.”

Others, however appreciated this new tack. “There are naysayers to this approach,” said one long time local activist. “Fortunately for The Russell Family Foundation, the community has a great perception of who they are and what they’ve done. And through these convenings, and by being accessible and talking to people about what they intend, I think people understand that it’s the real deal.” TRFF embraced the outcomes of this ‘outside-of-the-box’ approach — and considered what it might mean for the PWI long term.

As one internal stakeholder explained, “People who have never talked to each other before are talking to each other – and that’s huge. I talked to one farmer, an older guy who’s been involved in the organic farming community and the politics around that for 50 years. He said, ‘Yeah. I’ve met people around that roundtable who have always been on the other side of the fence. But I think we can work things out.’ That’s big. So, there will be change. There has been already.”

A prominent scientist explained that when coming to the Advisory Group dinner, he thought he would know everyone and that they would all be seasoned water experts. But instead he knew very few, causing him to ask himself, “Wow, who are these people?”

“We’ve strayed as a general population. There’s a sense that someone else is taking care of the environment. But there’s an opportunity to educate the next generation, to help them understand the issues and how we can all help.”

– External

Building Momentum

“There’s a ‘show me’ point where someone has to make a decision and move things forward. We work toward consensus, but someone in the Foundation has to lead this.”

– External

Having chosen the Puyallup as the region of focus, the PWI has by default chosen more than 280,000 people as de facto constituents of this project. And in order to have an ultimate impact, the Initiative must reach out and energize some percentage of that population. “To make movement on watershed improvement, every single human being that lives and works and plays in the watershed needs to know their role and what they can do about it” said one local leader. And that is a tall order.

As one stakeholder put it, “Can the PWI truly move the needle or revolutionize the way the watershed trajectory is going or how people care about their watershed or how people live and work and play within their watershed? This would impact everything — the transportation system, how people treat their lawns and gardens, housing and construction trends — everything.”

A public awareness and outreach ‘campaign’ related to the PWI seems to be understood by many as

critical, but at present it is dependent on the various COIs to make that happen, to have those affects felt throughout the watershed, and to translate that into demonstrable impacts. “I believe you can’t have enough public education,” said one stakeholder.

The Leap from Theory to Practice

“There’s a theory that what’s missing from the environmental movement are people — meaning the people who, in most cases, benefit the least from such environmental programs. And it is important to bring these movements together — social justice, grassroots community organizing, policies, as well as scientific- and technically-driven solutions for the environment.”

– Internal

The COI grantmaking model for the Puyallup Watershed Initiative will require grantees to submit applications and conduct their work in collaboration. This structure is intended to foster and support the formation of partnerships around programmatic ‘communities’ — such as traditional agriculture, urban agriculture, environmental education, water quality, biodiversity, forestry, just and healthy food, trails and recreation, salmon, social equity, etc. — in order to create common agendas and to ultimately have a greater collective impact.

The COI model was born of theory and practice — through many discussions with key partners, other foundations, and funding and watching a working Community of Interest emerge out of the Pierce County Agricultural Roundtable. In a very real sense, the Initiative and its COI model

is a heavily “process based” project operating in an arena that can be heavily “solution focused.” “Our model is definitely to work with local stakeholders and communities to understand the goals that are important to them,” said one key internal player. “We then want to hold them accountable to adaptively managing their work over time to achieve those goals. That’s how we want to engage with local communities of interest.”

External stakeholders, too, have high hopes for the process. Says one, “I definitely am biased towards the collective impact model and the backbone organization being the organization that can find a way to get technical support to the different organizations so that they can pull together and have a collective impact. That is how the Initiative can help the COIs establish goals, run their organization and communicate with each other. The more that they are able to invest in some sort of infrastructure that could be sustainable the better.”

The role of the Foundation is understood to be both low-key and critical, especially its ability to act as an unbiased, respected entity. “It’s important to have an organization that people believe is neutral and can be a clearing house and connect the dots. Otherwise, it’s not going to continue.”

Despite all the best intentions, however, some key stakeholders in the region may always have misgivings about the Initiative. It’s a model that is somewhat organic in nature; yet highly directed by the Foundation — leading to both an array of unknowns and a potentially heavy TRFF hand. It is a community process to address what many see as science-based concerns; it is untested and ambitious, hopeful, and trusting — a logical step on a path paved with unknowns.

TRFF staff and Board members have committed themselves to this path with the conviction that the true expertise in the issue areas key to the preservation and protection of the Puyallup Watershed lie outside of the Foundation. And while the framework of the Initiative may have been crafted from within The Russell Family Foundation, the specific strategies for improving the water quality in the Puget Sound, addressing pollution runoff issues in upstream communities, protecting crucial salmon habitat and creating workable forestry practices that both support the local economy and promote environmental sustainability — as well as the projected goals and demonstrable metrics for documenting progress — will originate from within the community. The ‘arranged marriages’ of collaboration at the earliest stages — to come up with visions and strategies have already (by the end of 2013) led to some positive reactions and some negative rumblings.

“We have forced bigger organizations into collaboration with each other, in hopes of avoiding everyone asking for the same dollars for the same project,” said one stakeholder. “And we have asked them to work together and to diversify – but I wouldn’t say that was necessarily successful yet for many reasons.” Some fear the Initiative may be too ‘cerebral’ to build momentum. “People are most successful when there is a problem or a common enemy. They need a sense of urgency driven from passion to achieve something,” said a local leader. Others fear that while already broad, the COI model may not be broad enough. “Talk about

a community of interest — the business community should be one, but I’m sure they didn’t submit a proposal.”

The Search for Leadership

We need a public awareness in the community that you can complain to electeds that they need to follow the rules, that you can make a difference in public policy. People need to be able to engage the politicians. They need to be able to say things that make sense to the speaker as a member of the community.”

– External

“How do you build stewardship and create cohesive communities around that concept of stewardship? First I would make sure that there are leaders in the different places — physical places and conceptual places that are worthwhile — because none of this is going to happen unless there is a leader leading it.”

– External

One way the Foundation hopes to address some of the obstacles inherent to the process and to build momentum and continuity for the Initiative is through intentional leadership development. As the COIs develop and evolve, one of the Initiative’s key strategies is to use these COI conversations as a natural forum for organizations and individuals to step into more prominent and vital roles in their communities — although the Foundation has taken pains to avoid any pre-defined leadership outcomes. “As soon as the Foundation owns it, then the community doesn’t,” said one participant. “But at this point there’s no consensus in the community as to who should own it.”

Building a leadership infrastructure and supporting individual leaders are endeavors that are fraught with challenges. “Right now, it’s the bifurcated nature of the leadership and the watershed.

There are a bunch of different jurisdictions and a bunch of different interests. And there is no driving body that can take the mantle on any of the issues. Farmland protection is a perfect example. Who’s in charge of farmland protection in Pierce County or in the Puyallup Watershed? It’s hard to say.”

Another key question is the Foundation’s ultimate role in this Initiative, both internally and externally. TRFF has traditionally taken a behind-the-scenes approach to grantmaking — striving to be a good steward of the region’s resources while allowing the activists and grantees involved in the programmatic work to take the more public role.

However, by launching such an ambitious initiative, TRFF has — by definition — become a key player, and many are looking to the Foundation totake a more out-front position in order to move the project forward.

Preparing for Change

“One million dollars is a drop in the bucket. It’s only through collaboration that this will ever make any forward progress. We know that. We know we can’t fund the whole thing.”

– Internal

The Foundation has committed to funding this effort for ten years — and while a decade may be but a blink of an eye in terms of a region, a metropolis, or a watershed, for a grantmaking institution of TRFF’s size and scope, it is a significant commitment. And in order to step up

to those commitments, the Foundation must also attend to itself as it evolves and adapts to meet the shifting demands of new structures, new partners, and ultimately the succession of staff and board over a decade long project. The administration of

collaborative grants versus grants to individual institutions represents a change, as does managing a staggered and fluid rate of development among the various Communities of Interest. The COIs themselves will each contain varying numbers of organizations — all of varying sizes and budgets — making standard annual or bi-monthly grant cycles but a fond memory.

To help manage this and other aspects of the PWI, the Foundation has forged a partnership with the Bonneville Environmental Foundation (BEF) which will serve as a key intermediary in the administration and strategy of the Initiative’s early years. And BEF, a Portland Oregon-based nonprofit, has already hired a locally-based, full time program director for the Initiative. Foundation staff, too, have already shifted and will need to be flexible in the coming years.

“Around every corner lurks a new set of challenges,” said one stakeholder. “So you need staff with a broad set of experiences to help move this whole Initiative forward and assume some leadership to funnel this work toward more effective and focused outcomes.”

Looking Ahead

“There’s an opportunity to educate the next generation, to help them understand the issues and how we can all help.”

– External

From a questioning Board of Directors to a 10-year commitment to the first grants just over the horizon, the Puyallup Watershed Initiative has already come a long way – but it has much, much further to go.

“The real challenge here is how does that whole social piece of the puzzle translate into this environmental piece? How can you track objectives and metrics in that arena on a group-by-group level and also collectively? And then how can you compare those two?”

There is still much work to be done to integrate the social justice issues — that are so important to many Board, staff, and community members — into the Initiative’s framework both in terms of the Initiative’s programmatic structure, and in terms of philosophical differences. “There’s a lot of work to be done on social justice issues,” said one local expert. “And there’s a lot of work to be done on social justice issues that have an environmental side to them. And if we see our charge as delivering you an ecological result, you can also have social issues attached to that. But it’s hard to make them both primary concepts given this landscape and given this set of issues. Personally, I wouldn’t know how to do

“Their goals have a lot to do with trying to build community and a kind of community stewardship. They’re not scientists, which they’re very clear to say — they’re funders. And the Foundation made a decision that it wanted to focus on environment. They felt that they could use this Initiative as a way to build community and build capacity in communities in this area.”

– External

that and still deliver measurable, tangible, ecological results in a 10-year time frame.”

During this period — as the COIs take shape, the team becomes more familiar with one another and questions continue to arise — perhaps one of the only certainties is that missteps will inevitably take place and that positive outcomes will be due, in part, to understanding and acting on those lessons learned.

But the Foundation seems ready for that and prepared to learn as it goes.

“The vision was that the Foundation wanted to make a long-term investment in one place with the belief that a more strategic and focused commitment would build a different relationship in the community and would achieve better ecological results over the long term.

They are trying to make people aware that this is very hard work. That may give you money but that may end up being the wrong decision. The Foundation has been clear that it wants to know about the missteps, as opposed to hearing ‘Oh, everything was great.’

They wanted to build trust in their partners so that it was understood from the start: that everything isn’t going to be perfect and that there should be more learning. Iterative learning and trust are what will be needed to achieve the goals of the Initiative — and of the communities of the Puyallup.”

METHODOLOGY



METHODOLOGY

IN THE SUMMER of 2013, The Russell Family Foundation (TRFF) engaged Fern Tiger Associates (FTA)¹ to research and articulate the early thinking and start-up phase of TRFF’s Puyallup Watershed Initiative and to lay the groundwork for the development of a Foundation-driven RFP for the documentation of the life of the Initiative. As noted below, more than 40 individuals were interviewed as part of the process. Most interviews lasted approximately an hour and a half and some people were interviewed a second time to follow up on additional information obtained since the first interview. Each interviewee was asked a unique set of questions reflecting what was known about their background, the quality and depth of their involvement with activities in the Puget Sound or with the Foundation or Initiative. All interviews were conducted in person during the months of July, August, September, and October of 2013. Key themes addressed in the interviews included the important decisions leading to the launch of the PWI; the hoped-for legacy for the project; the challenges of coordinating and evaluating a large initiative that relies on leadership and stewardship to impact the ecological health of a region; and philanthropic support and approaches to environmental grantmaking, both historical and current. In addition to the interviews, FTA also examined the vast amount of material collected and created by the Foundation itself as it worked to start up the Initiative. Specifically, FTA completed the following tasks:

- Reviewed internal materials and planning documents, including the history of watershed issues and “place specific” concerns, ideas, and experiences as well as Foundation studies and other documents; examined notes, agendas, participation lists, and other information related to convenings and key meetings completed prior to start-up of FTA’s work, as well as board dockets related to the Initiative;
- Met with TRFF leadership and staff to understand and confirm: Initiative vision, near- and long-term goals, strategies under consideration and/or being implemented, project priorities, timing, and calendar of benchmarks;

¹ For more than 30 years, FTA has supported the work of over 150 nonprofit organizations, government agencies, philanthropic foundations, universities, school districts, and select corporations working for social change at the local, regional, and national levels — helping them become more effective and sustainable. FTA brings a comprehensive and transdisciplinary approach, a commitment to authentic dialogue and decisionmaking, a rigorous information gathering process, and creative approaches to photography, design, messaging, and branding that are uniquely appropriate for each client. The firm has been recognized by clients and peers for its multi-faceted services: FTA develops and supports effective organizational strategies; conceives and creates comprehensive communication solutions; designs and facilitates authentic community engagement; and gets the facts and tells the stories to produce creative documentation and evaluation.

- Developed list(s) of possible interviewees; facilitated more than 40 one-on-one, in-person, confidential interviews (as well multiple informal conversations), representing a core cross-section of internal and external stakeholders, including research, preparation, and analysis;
- Reviewed best practices related to place-based philanthropy; community organizing; environmental grantmaking; collective impact, and other relevant fields;
- Met with funders beyond the South Sound to understand similar and/or related philanthropic endeavors;
- Followed local and regional developments directly or tangentially related to PWI and TRFF;
- Photographed region and select Initiative activities occurring between July and November 2013;
- Attended and/or participated in Initiative activities and meetings, including Foundation Team meetings to understand ongoing development of Initiative and landscape;
- Worked with TRFF staff to design and facilitate board session to present and discuss research and findings, and to gather Board input related to desired outcomes for PWI;
- Provided input to TRFF and acted as thought partner related to PWI, based on previous experience and project-specific research;
- Developed descriptive narrative focused on the start up of the Puyallup Watershed Initiative and related Findings, leading to the creation of Recommendations related to ongoing Active Documentation (all following in this Report).

FINDINGS AND OBSERVATIONS



FINDINGS AND OBSERVATIONS

THE FOLLOWING FINDINGS and observations are based on research conducted from July through November 2013 — thus, the findings can be described as a “snapshot” of the Foundation and the Initiative, reflecting a particular moment in time.

The findings are informed largely by a series of intensive interviews, understood in the context of an extensive array of other materials. (Also see “Methodology.”) While a majority of these findings may not provide completely new information to TRFF, the full range of information gathered is reflected here to provide the appropriate contextual framework for recommendations related to an appropriate and effective strategy for documentation of the Initiative over its ten-year life.

Each finding is titled, and each includes a very brief “birds eye view” description, along with one or more anonymous quotes,¹ and a bit of explanatory narrative. It should be noted that the quotes are from the interviews and are attributed only as “internal” (board or staff) or “external” to ensure the promised anonymity. It should also be understood that while all of the quotes are from individuals, they were selected because each reflects a sentiment that was shared among many, not solely the individual who made the specific statement. The findings offer a glimpse into the Initiative, and set the stage for future documentation efforts.

¹ It should be noted that the quotes are from the interviews and are attributed only as “internal” (Board and staff) or “external” to ensure the promised anonymity. It should also be understood that while all of the quotes are from individuals, they were selected because each reflects a sentiment that was shared among many, not solely the individual who made the specific comment noted here.

Time for Change

Ten years seems like a long time for an initiative, but it’s a blink for a watershed. Maintaining energy, enthusiasm, and momentum will be key.

“Whatever happens, don’t let it stall. When that happens, people withdraw. In general, there’s always more pessimism than positive energy... so you need to hold on to the excitement and feed it.”

— External

Long term commitment is typically valued by communities, and so it is in the case of the Puyallup Watershed Initiative. But a 10-year life brings with it not just the power of longevity; it also brings the inherent challenge of maintaining energy and enthusiasm, over an expansive area and among disparate groups — each with their own agendas and aspirations. To ensure continued support it is critical that visible “wins” are well documented and circulated to key audiences in order to maintain enthusiasm and momentum.

An Informed Decision to Embark on a Challenging Path

In picking the Puyallup, TRFF made a tough choice. The watershed spans geography, demographics, issues, and jurisdictions like no other. Thus, this Initiative can yield a lasting local impact — for the community and also for the Foundation — but it also presents a daunting challenge.

“As a board, we asked ourselves: Should we continue to fund organizations in small amounts, over a long period of time? Is this the best thing for the organizations? What can we do that matters, and that will make a difference? It came down to the importance of place — this place.”

— Internal

“You have the urban infrastructure, different counties, different jurisdictions — it’s just a very, very complex landscape”

— External

The Puyallup Watershed covers an enormous geographic range including communities that stretch from the city of Tacoma to Edgewood to Sumner to Orting to Wilkeson. It includes tribal lands, tribal politics, and tribal environmental innovation. It includes a working port, multiple municipalities and jurisdictions, and even a major national park. Throughout these communities, the issues vary — from salmon preservation to non-local land ownership, to residual effects from clear cutting forestry practices, to the disappearance of agricultural land and the employment and economic impacts associated with most issues. But, the Foundation was deliberative in its decision-making. The Foundation determined that it should move from its previous responsive grantmaking approach to a more comprehensive focus on building a shared response to the Puyallup Watershed. Though not the easy path, it is hoped that this will provide a meaningful and lasting impact for the community and the future of the Foundation.

Building from a Foundation of Trust

The TRFF begins this Initiative on high ground – from a position of trust and respect in the community. But as the PWI goes forward, there will be a greater “Show Me” attitude. There’s appreciation and hope in the community about the Initiative — but it’s mixed with healthy skepticism.

“Someone at the Foundation needs to clearly articulate the mission and the benchmarks of the Initiative.”

— External

“The Russell Foundation changed the tone to a listening tone, and that was really smart. It’s been a very good beginning.”

— External

There is an enormous amount of respect and admiration for TRFF and the Russell family. This provides the Initiative start-up with a great deal of support and minimal skepticism, even with the perceived changes at the Foundation in direction and staffing over a relatively short time span of less than two years. To some extent people are taking a “wait and see” attitude — but, as one interviewee said, “There’s a ‘show me’ point where someone has to make a decision and move things forward. We might be working toward consensus, but someone in the Foundation has to lead this.”

In some ways, the reputation of TRFF rests not necessarily on the ultimate “success” of the initiative, but on the way in which the process itself is perceived.

TRFF’s sense of humility and willingness to be part of the learning process needs to continue to shine through.

In contrast to the public perception of The Russell Family Foundation, there is minimal understanding of the role currently played by Bonneville Environmental Foundation (BEF) beyond the small core of closely engaged participants. And among that core of participants, BEF is seen as an operating arm of the Foundation, rather than an independent decisionmaker. It’s clear that the community’s view of the Foundation will, by definition, be shaped by the selection of the long term intermediary if that group is to be the on-the-ground connection with the communities.

From the Water to the Land

The PWI moves TRFF from sea to land, shifting from a largely marine funder to an “upstream,” community-based funder.

“The perception of The Russell Family Foundation was that they were a marine-funder. Puget Sound is salt water — they were considered an oceans funder. What this focus on polluted run-off did is move The Russell Family Foundation onto land. But they always saw themselves as a learning organization, and so there was a high tolerance for saying, ‘Great. Let’s figure this out.’”

— External

“This Initiative is an effort to try to protect the waters of Puget Sound by going further upstream — to the terrestrial landscape that determines the quality of the water that spills into the Puget Sound. Puget Sound really is determined by what happens in the headwaters and everything in between. We have begun to acknowledge the importance of the shorelines and the people along the shorelines and further upstream ... that determine what goes in the Puget Sound.”

— Internal

The PWI marks a significant shift for TRFF — from being widely perceived as a marine / saltwater funder to a community / upstream funder. This shift of “moving onto the land” is perceived as setting the stage to fund different types of organizations, doing different types of work than what TRFF has traditionally funded.

Community Goals + Foundation Goals

The COI and Collaborative Grantee model means community-defined strategies and goals, which may or may not fully reflect the Foundation’s goals — which are yet-to-be defined publicly. Grantees (and the greater Tacoma community) expect the Foundation to articulate its goals — goals that support the fluidity and flexibility necessary for this approach, but might still create the “greater whole.”

“Their goals have a lot to do with trying to build community and a kind of community stewardship. They’re not scientists, which they’re very clear to say — they’re funders. And the Foundation made a decision that it wanted to focus on environment. They felt that they could use this Initiative as a way to build community and build capacity in communities in this area.”

— External

“What’s best is to have a collaborative group of people from diverse areas that all come together and say ‘This is the strategy. We thought about the priorities and these are the most important things.’ If this Puyallup project could get to that point, it would be effective.”

— External

One of the core tenets of the Puyallup Watershed Initiative is that the expertise, strategies, and goals be defined by the community through a Communities of Interest model. By explicitly requiring that grantees collaborate in the development of a proposal, the Foundation is attempting to actively foster common agendas, common goals, and shared work plans within these Communities of Interest (COIs) and hopefully across the region as a whole.

However, one element that seems to be lacking is the articulation of the Foundation’s own goals for the Initiative as a whole — to grantees and to the community at large. While allowing for the flexibility necessary for a long-term and multifaceted project, it is hoped that the Foundation has the opportunity to create a more powerful driving momentum and shared vision by defining and actively working toward its goals in conjunction with the goals of the various COIs. In this manner, the “whole” will almost by definition be greater than the “sum of the parts.”

It’s Complicated: “*Knowing all that is going on isn’t easy.*”

There are multiple projects, individuals and organizations addressing watershed issues. But there is also a lack of infrastructure to support leadership, coordination, and communication. There is an opportunity for PWI-supported efforts to step into these roles.

“What the Foundation is trying to do and what we’re trying to do is almost identical.”

— External

“People don’t see the larger picture of how much stuff is actually happening, because a lot of information isn’t being shared.”

— External

For the Initiative to be most effective, it will need to develop a mechanism for keeping abreast of parallel efforts and leverage community wins to support larger efforts, and vice versa. In some ways, there is a lot of work going on within the Puyallup Watershed; in other ways, there’s a wide-open path to do something there. One challenge is that a handful of organizations believe that they are already doing the work that the Initiative is hoping to support, in part because the precise nature of the Initiative is evolving, and is open to interpretation.

It’s Clear: “*Consensus is the only way to get things to happen here.*”

The environmentalist vs developer conflict is less sharply felt in the South Sound than in other places. Thus the Initiative may be able to create space for productive dialogue between these traditional adversaries.

“If you don’t have money, you’re not going to be able to care about the environment. So you have to have jobs and industry and economic growth.”

— External

“As a developer ‘place’ is very important to me. This waterfront is critical on many levels and it needs to be preserved as a place for people with parks, walkways, and amenities. That makes it an attractive place to live and to work.”

— External

The South Sound is not home to the same sort of major environmental advocacy efforts of larger metropolitan hubs. Perhaps as a result of this, there has not been the typical highly contentious and adversarial relationship between the traditional “environmentalist” and “pro-development” communities. There has been an increasingly supportive business community that to a large degree understands how a healthy environment is ultimately in its best interest, while the environmental community in the greater Tacoma area generally accepts that a healthy economy is vital component to the region. Thus there appears to be a good chance for dialogue as well as mutual support — and the Initiative has a role to play in creating space for that dialogue.

Clearly there are moments when serious conflict could arise between different stakeholder groups, and it is hoped that the Initiative will help to forge a space for dialogue that will build understanding and mutual support. Documenting stories of relationships built and positive outcomes generated has a role to play in this endeavor.

Watershed as Place; Watershed as Vehicle

Leveraging environmental work to build community capacity is innovative and unconventional. Emphasizing community input, inclusivity, and social/environmental justice creates opportunities and challenges for key audiences, including traditional environmentalists.

“The environmental movement has worked itself into irrelevancy because it’s science based, because it’s technically based, because it’s largely regulation, regulatory based. And while that’s good for achieving certain kinds of wins... it’s essentially removed from people. ... [It is important to make] these two movements whole by bringing them together — social justice, grassroots community organizing, policies, science, technically driven solutions for the environment.”

– Internal

“What’s missing from the contemporary environmental movement are people and not just any kind of people — the people who in most cases have the least benefit from the environment.”

– Internal

The Puyallup Watershed Initiative falls directly in line with one of the core tenets of TRFF’s mission — “supporting environmental sustainability.” While the environment is the overarching umbrella for the Initiative, and water quality and watershed protection is the next level down, in reality, many TRFF staff and Board members see the focus on the watershed as first and foremost a vehicle to strengthen community — a concept that sometimes confuses the more traditional environmentalists.

Leveraging programmatic environmental work to build community capacity is an inherently unique premise for a grantmaking initiative that can create a lack of traditional clarity around goals — goals for the Initiative and goals for the Foundation.

The Initiative’s unique approach is working to connect social justice issues with environmental issues. However, in many cases, these connections are not the most natural or intuitive. And in many cases, the desire to include as many diverse communities as possible falls into open conflict with traditional conservationist groupings and patterns.

In response, the Foundation seems to be taking steps to address this issue by investigating the possibility of one or more COIs directly focused on more traditional social justice issues. How those COIs are formed, and how they interact with other COIs, will be a telling factor going forward.

An Innovative Place-Based Approach to Building Capacity

With the initial Foundation-based decision, the PWI is not traditional “community organizing” — but it does bring different philosophies together and leverages existing work to build community capacity.

“There are foundations and government entities who are funding projects — capital projects, runoff projects — all the time, but I don’t know anyone investing in the social fabric and the social capital of the watershed.”

– External

“The Puyallup is definitely more of an urban watershed and so what you’re going to see in terms of an ecological impact of any work is probably going to be minimal. But the potential of what you can see in people is probably a lot bigger.”

— External

While it could be said that the Initiative is in some ways based on elements of “community organizing,” in that it asks people to come together to define their goals and work together to make them happen. However, in many ways it is not an organizing effort, because the big issue has been predefined outside of the community, by a funder. A more accurate description may be a ‘hybrid approach’ as the Foundation weaves together different philosophies — collective impact, communities of interest — in an effort to address the Foundation’s particular interests, resources, goals, history, and place.

People Need Knowledge

One agreement among the watershed community appears to be that there is an unfortunate lack of public knowledge and awareness around watershed issues — leading to a desire for, and potential benefits of, a broad public education campaign.

“We’ve strayed as a general population. There’s a sense that someone’s taking care of the environment. But there’s an opportunity to educate the next generation, to help them understand the issues and how they can help.”

— External

Many internal and external stakeholders express a strong interest in public education about issues related to water and air quality — in terms of the kinds of work that is being done locally and elsewhere; in terms of how individual behaviors impact water and air quality; in terms of how actions in one location (upstream) impact outcomes at other locations (downstream); etc. This suggests a broad, watershed-wide, Foundation-based effort toward meaningful public education could be well-received. Additionally, ways could be found for local organizations, including those engaged with COIs or others, to be provided with tools to enhance local or topic-based public education in support of more broad-based public outreach and vice-versa.

Public awareness does currently exist around some pressing issues. For example, the ill affects of storm water runoff has received a good deal of attention,

and the loss of farmland has been hard to ignore since such an enormous segment of the agricultural landscape has been transformed – if not erased – over the last 20 to 30 years. Despite this, there is a consensus within the environmental community that there is an overall lack of knowledge and understanding of the broader issues and deeper impacts around the watershed.

Communities of Interest: Providing a Framework for Leaders to Emerge

The Communities of Interest (COI) model is designed to expand the Initiative’s reach, allowing more organizations and activists to participate and assume leadership roles. Moreover, a few larger players may use the model to exert excessive influence.

“How do you build stewardship and create cohesive communities around that concept of stewardship? First you make sure that there are leaders in the different places -- physical places and conceptual places that are worthwhile — because none of this is going to happen unless there is a leader leading it.”

— External

“We’ve been working in this area for many years, and yes.. we do have an agenda that we hope will be consistent with the COIs. We intend to make our case for that agenda among the COIs.”

— External

One of the key ways in which the Foundation hopes that local leaders will emerge is through the Communities of Interest (COI) model. As the environmental efforts in the Puyallup Watershed lack a coordinating entity, the COIs can serve to define organizations and individual leaders to help occupy that space.

The Foundation’s current approach to allow each COI to define its own set of priorities and its own structure may allow for an honest and balanced partnership between funder and grantees. But there will also be inherent challenges in managing the wildly variable timelines, scope, goals, impacts, and capacities and personalities in so many unique collaborations.

One of the significant advantages of the COI model is the ability to expand the reach of the Initiative by creating a larger arena in which more organizations and

activists can potentially participate. Conversely, there is the potential for significant overlap between different COIs, as the separate fields of interest naturally intertwine with each other. Without clear communication among and between the COIs, this can lead to possible confusion and ‘turf battles.’ Additionally, if larger, more established organizations find themselves naturally drawn to multiple COIs — because their own programs are so varied — this could lead to the overly-weighted influence by a few players or mission creep within the COIs (especially if the representatives of those organizations have an “agenda” to promote).

Collaboration: Upsides, Downsides

Required grantee collaboration is an opportunity and a challenge. Some organizations feel this is an ‘extra hoop,’ while some feel they may be better off continuing on their own. However, there is a fear that without participating in the Initiative, they will not be funded.

“I think 90% will get fed up and lose interest because they want to get a check to pay their staff to do “x.” They’re worried about paying the bills and protecting that piece of ground or restoring that mile of stream. They’re hustling from project to project just out of survival mode. Many just don’t have the staying power.”

— External

“I like the idea of trying to affect change in this watershed. That’s why I’m in it. But the question is, how much rigmarole this is going to be. The process of spending time meeting and working on these goals and things — that I have to squeeze in with everything else that I’m doing. Because if somebody else is giving me funding to work on a project, I have to work on that.”

— External

Asking people to come together to work collaboratively is seen both as an opportunity and a challenge by local residents and organizations. Small organizations feel they are being asked to jump through yet another hoop to get much-needed funds, when they are already focused on what they have come to believe is the most productive course of action possible to support the Puyallup Watershed (often after many years of work in the field and in the region). That said, some see value in coming together to think in new ways, to learn from new

partners, to push forward with “the best of the best thinking and methods” and the chance to “create opportunities to make a bigger impact together, by combining our efforts, than by working as individual agencies and organizations with our own agendas.”

The focus on collaboration is expected to provide the benefit of additional capacity and coordination that is currently lacking; but it is also seen by grantees as stretching the “capacity of people to participate in one more meeting, one more thing they have to think about.”

While the Initiative is focused on collaboration and consensus, some feel that a certain amount conflict is to be expected as issues move toward any significant policy change.

From Responsive to Collaborative; from Immediate to Intermediary

The PWI has created significant staffing and grants management changes at TRFF, including two structural shifts: collaborative grant making and the use of an intermediary structure.

“In a way, the Foundation is saying that you need to get the right people in the room... and those people might not be the experts. You have to come to a problem with a fresh kind of beginner’s mind; an expert may be somehow blind to a certain perspective because experts are often over-trained.”

— Internal

“What I’ve seen seems kind of wishy-washy. That’s what’s really tough for potential applicants. So everybody is sort of staggering around trying to figure it out because it seems to be this iterative thing where now you propose something and then they say “No, that’s not quite what we’re looking for.” So if you don’t know what you’re looking for, why don’t you tell us and coordinate it from that end rather than waiting until we get what it is that you really have in mind?”

— External

Aside from the staffing and grants management changes that have occurred at TRFF as a result of the PWI, the Foundation will now experience two significant structural shifts: collaborative grant making and the use of an intermediary structure.

The Initiative is seen by many inside the Foundation to reflect the Russell family’s philosophy about respecting the value of input by “non-experts” as well as experts and using dialogue and convening to move a problem toward a solution. Similarly, the Foundation’s philosophy stresses the importance of “instructive failures” — if you are not failing at some goals, and learning from them, then you are not advancing as well as you should be; you need to “listen to the unusual partner.” Together, these philosophies form a key construct for the Initiative.

As the PWI develops the Communities of Interest model, grantees are being required to work in collaboration and submit joint grant requests (or early Statements of Interest). This will require a new and potentially untested set of grants management skills.

Through the contract with Bonneville Environmental Foundation, The Russell Family Foundation will also be engaged with a new staff and structure to serve as an intermediary (sometimes referred to by the Foundation as the ‘backbone’) organization to support the PWI. This will entail new staff supervision and administrative roles and responsibilities, as well as integration of organizational values, culture and programmatic alignment.

A Perceived Lack of Leadership

There is a noted lack of leadership in the watershed, which some attribute to the many jurisdictions in this target area. Bringing in BEF as an intermediary is intended to move the work forward as local leadership emerges.

“We’re embracing our role as a grant maker and a convener, not as an implementer.”
— Internal

“We need a passionate, respected leader to move this forward to a plan that results in action.”
— External

The Foundation sees itself, and is seen, as a leader, but not in the traditional sense — given its propensity to take a back seat, rather than a center stage role. In many ways, the Foundation is addressing the perceived lack of leadership by bringing in BEF as an intermediary, with the hope that BEF can help move the work forward in the Initiative’s start-up years, during which time multi-faced, local leadership will emerge to “own” the watershed efforts and ultimately take on an active role.

The Puyallup River Watershed Council is in many ways the logical home for many Initiative-based functions — yet a lack of funding, support, and leadership suggests it is not ready for such a role.

Creating a Model, Sharing the Knowledge, Communicating the Challenges and Successes

The Initiative is a significant investment for the Foundation — yet outcomes are unknown and paths are uncharted, making communication both critical and challenging.

“Philanthropic dollars are entrepreneurial dollars. They are piloting monies. They are demonstration dollars.”
— Internal

“As soon as the Foundation announced that they picked the Puyallup Watershed they stressed that they were going to be cautious. They didn’t want to just go fund more projects like the ones they normally fund. They wanted to do something different and unique – not only to improve the Puyallup Watershed, but to create something that could be replicated in other watersheds in Puget Sound and probably all over the world.”
— External

“One of the toughest jobs is being able to communicate to stakeholders the power of this approach. It’s been communicated, but I don’t think the light bulbs have gone on, not enough community leaders have had an ‘aha’ moment about the power of this approach.”
— External

For those who call the Puyallup Watershed home (including those within the Foundation and the broader community), the Initiative is a significant investment — for which local stakeholders have great appreciation and high hopes, laced with a healthy dose of skepticism and trepidation. In part, that is because the Initiative has been designed to be organic, so the outcomes are not only unknown, they are undefined (as yet) and their paths’ uncharted. Thus, an ongoing, broadly defined

yet strategic approach to communication and documentation that provides a window into the workings and learnings of the Initiative are critical – in order for the Board to most effectively direct its resources, for the community to understand its implications and its impacts, and for its value as a model to be maximized.

Diligent information gathering and knowledge management are necessary to allow the Initiative’s unique approaches in this endeavor to become a more widely applied model for change in this sector — both in terms of watershed preservation, collaborative approaches to grantmaking, and community capacity building.

Facing — and Cracking — the Policy Question(s)

The PWI tackles multiple issues in multiple jurisdictions. The COIs will face a complex, core challenge — to find the political will and muscle to create real policy change.

“My ultimate goal would be that years down the road, maybe ten years, you have a set of resilient, self-organized institutions or communities of interest that have a long term strategy in place — maybe a 30-year strategy to achieve these environmentally and socially relevant goals. And I’d hope that they each have metrics and monitoring methods are in place to understand if and how they are making progress... and that there are policies and regulations that have been enacted to support this.”

— External

Almost by definition, the Initiative’s community-led, COI-based approach will result in a wide variety of strategies and tactics throughout the region and across multiple programmatic areas. One recurring note, however, has been the consistent question of policy, i.e., Will the political will and muscle emerge to enact truly effective policy once the COIs have defined their core issues and directions? Other perhaps more traditional environmental-based grantmaking initiatives have taken the route of initially funding deep research and then moving to leverage that research into developing and forwarding policy-based solutions. Still other initiative funding models have provided parallel support for community problem solving and for broader public policy.

The PWI will be operating on multiple levels of organizing principles (industry, interest, social, geographic) and within multiple municipal and regulatory jurisdictions, making the question of policy work as multifaceted and complex — if not more so — than every other variable.

Under the Radar

There has been a very limited public face for the Initiative, including a bare-bones presence on trff.org. While this tracks with the Foundation’s traditional low-profile, it hampers understanding and support for the Initiative.

“The public as a whole within the watershed should have some understanding of what’s going on. And that’s where I think the Foundation and the COIs are going to need help.”

— External

“If every COI is communicating independently, the messages could get very confusing.”

— External

“I know that they don’t know what the next step is going to look like yet at this point. Part of the skepticism is that there was so much time and discussion and talks about what this initiative was going to be. But everybody is scratching their heads trying to figure out what does that mean? It wasn’t very clear and so through this process we’re slowly starting to learn what it is we’re supposed to do. And so, people are frustrated at this point because they feel like — we don’t know what the next step is, we don’t know what the timeline is.”

— External

The Puyallup Watershed Initiative has become the de facto flagship grantmaking program for The Russell Family Foundation – embodying core Foundation values, displaying a deep commitment to the region, and engaging in innovative and cutting-edge philanthropic practices. Yet little to none of this work has been made public. The Russell Family Foundation has traditionally maintained an unassuming profile when it comes to promoting its work, focusing rather on raising up the work of its grantees. With the PWI, however, these goals would be greatly supported by increasing public awareness of the program and the Foundation’s efforts throughout the region.

Creating an intentional and programmatically-focused public face for the PWI can not only help build support for the Initiative’s work within the community, but could also be a crucial step in attracting other funders and partners. This would entail basic communications elements such as clearly articulated mission statements and goals for the Initiative; an agreed upon set of definitions for commonly used

terms by the Foundation and its partners; an overall communications strategy that is integrated into the programmatic plans and calendars; and a prominent, coordinated Online presence — either within the TRFF site, or as a potential ‘free-standing’ site (as is the case with the Willamette River Initiative at the Meyer Memorial Trust).

Continuing Questions

Even as recently as the November 2013 TRFF Board meeting there remained room for discussion regarding the Initiative’s main messages and desired outcomes. In order to promote understanding, buy-in, and organic engagement, the conversation should continue, developing internal consistency and cohesion that can translate to clear communications.

“Success is that it’s sustainable. That it continues on its own.”
— External

“What’s started is good. Now it’s time to turn the page and see what’s in the next chapter.”
— External

One of the most important, if largely unspoken, goals of the Initiative is that it continues on its own well past the 10-year mark. Supporting the emergence and growth of sustainable organizations, viable local leaders, and a common agenda around key components of the PWI will be less impactful if it all ends after TRFF funding stops. And, although this is not the most important factor, having internal consistency and buy-in is an important part of moving forward. During the most recent meeting of the TRFF Board, there was still discussion about the main focus and programmatic strategy of the PWI — largely between demonstrable water quality improvements and softer relationship and capacity building social goals.

Documenting the Proverbial Elephant

The Initiative is different things to different people. To understand the whole one must understand the parts — and their relationship to one another.

“I’m all about stories. I like to see stories of where change is happening. That’s what I remember.”
— Internal

“Show me real data, return on investment, changes to quality of life. Show me the numbers that document success — however you define success, be it salmon recovery, storm water, education, volunteerism, youth seeking education in sciences. It’s all good, and we need to document it.”
— External

Like the elephant is to the blind man, the Puyallup Watershed Initiative is different things to different people, and to understand the ‘whole’ one must understand the parts and their relationship to one another. Similarly, the learnings need to be documented, in order to understand the impacts of the Initiative.

For some, seeing physical or measurable changes in environmental quality are key. For others, understanding that local organizations are coalescing to bring attention to pressing issues is more powerful. Still others want to know about new relationships among organizations or key players that have been instigated thanks to the Initiative, and still others want to hear about educational efforts aimed at youth and how that directly or indirectly influences young opinions on environmental issues.

Despite a great desire for quantitative measurements, there remains a significant level of disagreement over the best ways to monitor the work that will be conducted under the aegis of this Initiative, from water quality results to salmon population, from acres of land protected to regulations affecting storm water runoff. Similarly, impacts to the environment will be difficult to pin directly to Initiative-based efforts.

People are also interested in learning about what is happening locally and in other places — from salmon recovery to flood mitigation to reducing storm water pollution, etc. It will be important to document and tell stories of the “hard changes” and the “soft changes” that take place in the Puyallup over the course of the Initiative.

RECOMMENDATION: A STRATEGY
FOR ACTIVE DOCUMENTATION



A STRATEGY FOR ACTIVE DOCUMENTATION

IN ORDER TO PROPERLY DOCUMENT the Puyallup Watershed Initiative, such that the results have depth and value, a comprehensive, creative, and sophisticated process needs to be employed. A vast range of information will need to be collected and then analyzed in rigorous and innovative ways. Those analyses will need to be compiled and translated to create understandable, useful, and engaging elements that illuminate specific aspects of the Initiative, as well as their relationship to one another. Then those elements will need to be combined into formats that meet the needs of key audiences and complement a broader Communications Plan for the Initiative and for the Foundation as well. “A Strategy for Active Documentation” is based on the assumption that the documentation of the Puyallup Watershed Initiative will be able to stand alone, but that its processes and products could be integrated and coordinated into an “as yet undeveloped” Communications Plan (distinct from, but integrated into the active documentation strategies). It should be noted, for example, that the Documentation Strategy outlines audiences, but only in relation to their needs for documentation products; a Communications Plan (which could become a task for the documenting agency, if it has this experience) should address the means by which these audiences receive this information as well as other materials from the Initiative.

The complexity of the documentation process suggests the need to prioritize and focus on the data that will have the greatest impact on the Initiative’s goals while taking into consideration a realistic appropriation of resources. Likewise, the comprehensiveness of the strategy requires a documenting agency that has a broad range of skills and expertise — combining analytical and creative fluency with the ability to grasp cultural nuances and technical data. While setting aside a minimum equal to 10% of initiative funding would be considered a standard in the sector for typical evaluations, the realities of this particular Initiative and the goals related to documentation lead to a more iterative and responsive approach, which might require additional resources to be allocated.

This is particularly true in the start-up year of the documentation, given the need to establish a context and baseline from which to proceed. The PWI is but one of many efforts attempting to impact the water quality of the Puget Sound. Over the course of the Initiative, as relevant environmental, political, or cultural shifts are monitored, the documentation process needs to assess the Initiative’s impact while having knowledge of the greater context. In addition, this will not be an exercise in

collecting solely scientific information. One-on-one interviews with a wide range of stakeholders, surveys of relevant documents from sister organizations, topical news media and institutional communications — all of these represent core avenues of information that should be tracked in order to properly reflect the Foundation’s goals regarding an authentically interactive inquiry into this field and the ongoing efforts to make a positive impact.

To achieve the desired ends, it will be critical for the documenting agency to be at once external (to ensure the ability to collect the most unbiased data) and highly engaged (to ensure full knowledge of the internal workings of the Initiative team).

Finally, it should be noted that while the following section (“Active Documentation — What it is and why to do it”) is provided to lay the framework for a potential consultant to understand the recommended goals and scope of the documentation process, the detailed explanations and task descriptions included in this report are considered “work products,” and are included here to provide understanding to the Foundation of what FTA’s approach would be to meet the goals described. That said, the charts in the Appendix related to data collection, analysis, and the creation of products are not confidential and could be included as part of an RFQ or RFP process, should the Foundation decide to take that route.

Active Documentation – What it is and why to do it

Many organizations document their work. Sometimes this is done intentionally, sometimes it is an ad hoc process; sometimes there are specific goals in mind, sometimes it is simply for historical record. Sometimes documentation (or evaluation) is required by funders; sometimes an organization is rigorous on its own to be able to make informed programmatic and organizational decisions. There is a traditional, quantitative approach used typically for annual reports or financial audits; or external evaluative methodologies to illustrate efficacy and return on investment. But too few organizations approach documentation and evaluation as a multi-faceted endeavor with a potentially wide range of uses. And even fewer organizations act upon this idea early enough to maximize its potential.

The Russell Family Foundation (TRFF) has expressed a clear understanding of the value that effective documentation can bring to the Puyallup Watershed Initiative (PWI). And that value will only increase if the appropriate creativity, passion, understanding, flexibility, and professionalism is brought to the planning and execution of this project.

One of the first steps in crafting such a plan is the clear articulation of the goals of the documentation process and products. The first and most basic goal is to create an accurate historical record of this project — capturing the who, what, where and when; the how many and how much; and the hard data and day-to-day information that can get lost in paper or electronic files or that may fade from memory as staff and partners focus on moving forward.

But there is also the “why” things happened as they did. For the PWI, Fern Tiger Associates (FTA) believes another goal is to support and maximize the Initiative’s effectiveness by providing real-time information that can inspire and inform the Foundation as it responds to emerging issues. An effective documentation strategy should provide clear, usable information and vital perspective to the Initiative team, enabling its members to assess incremental progress as well as the repercussions of their own decisions. This will allow for consistently-informed decisions going forward and ensure that the Initiative has the tools to be as effective as possible.

Additionally, the information gathered, analyzed, and presented in this effort can be re-purposed into persuasive communications targeted at key audiences — including potential funding partners for the Initiative. In this, and several other instances, there is an intentional overlap between the realms of documentation and communications. While documentation and communications are separate functions, in many respects they should be tightly coordinated. The Documentation Strategy is therefore described here as an integral part of a companion overarching

Communications Plan¹. This information can also build support for related efforts, locally or elsewhere.

Finally, and perhaps most significantly, by creating a Documentation Strategy that is designed to honestly reflect and analyze each stage of the PWI and to appropriately disseminate this information — both successes and challenges — the documentation process will speak to TRFF’s strong commitment to institutional transparency and community accountability, building on the Foundation’s already strong reputation.

Simply put, a comprehensive documentation project for the PWI should include capturing the Foundation’s work, process, decisions, activities, and the resulting impacts of those efforts on the people of the region. It will describe the efforts of TRFF, the intermediary (‘backbone’) organization, and the PWI Communities of Interest and their specific constituencies. The documentation will also track external and internal perceptions, changes, and activities in the broader community. The overarching goals of the documentation process should therefore include:

- creating a factual and accurate historical record of the Initiative;
- allowing for real-time, informed decisionmaking for the PWI;
- encouraging support from key partners, including potential co-funders for the PWI, and inspiring commitment to related efforts, locally or elsewhere; and
- embodying the Foundation’s commitment to transparency and community accountability.

Achieving these goals requires a creative and engaged documentation process — FTA uses the terms “active documentation” and “interactive inquiry.” These practices move beyond the necessary steps of collecting and archiving information in order to create a historical “after-the-fact” document or for evaluating programmatic impact. Rather, this proposed method demands a multi-faceted, sequential, and iterative process consisting of six primary actions — all of which need to be conceived and understood by all parties as coordinated and integrated elements of a unified, greater whole:

¹ It should be noted that the Documentation Strategy is distinct from a Communications Plan for the Initiative, yet it is clear that the information gathered and the tools created as part of the Documentation Strategy will complement and support the communications endeavors of both TRFF as a whole and the Initiative specifically. FTA recommends that a robust Communications Plan be developed and implemented, and has provided some recommendations (in the letter accompanying this document) that will be relevant for such a plan. But it should be clear that the Documentation Strategy is not in and of itself a Communications Plan.

1. **Collect.** The first step of Active Documentation is to define and collect quantitative and qualitative data. The ‘universe’ and taxonomy of information that will be collected needs to be defined early in order to produce the most useful and inclusive results throughout the process. This begins with establishing the avenues or sources of information, the methods of collection, and a system of organizing and archiving the information.
2. **Analyze.** Once collected, the data is analyzed. For the anticipated volume and various formats of information that will be collected to be of most use, data will need to be understood and analyzed independently while also cross-referenced and assessed through a variety of lenses. The various trends in individual variables as well as the relationships between and among the components of the Initiative will need to be established, as well as how the information relates to the programmatic landscape beyond the PWI.
3. **Translate.** After analysis, the information is translated and crafted into understandable and audience-appropriate “content packages.” These “packages” should include narratives, personal stories, organizational histories, programmatic timelines, network maps, graphic representations and charts, key facts, findings, and polling results to name just a few of the components that could be used to create documentation products.
4. **Create.** The content packages should be assembled to create a variety of creative documentation products in an array of formats — which could include print, video, Online content, presentation media, etc. (many of which could overlap or dovetail with communications documents).
5. **Disseminate.** The final documentation products should be disseminated to key audiences. The frequency, format, and content of these products should reflect the information needs of each audience. This aspect of the Active Documentation process will require tight coordination with the broader Communications Plan.
6. **Engage.** Ideally, a comprehensive community engagement strategy would be developed as a key component of the Documentation Strategy which would be informed by — and in turn, inform — the documentation process. Given the level of resources that such a plan would require, the Active Documentation process proposed has been conceived to create opportunities to engage the community to some degree, by proposing opportunities to discuss results and gather input.

The proposed Active Documentation Strategy that follows is divided it into five overlapping “Focus Areas.” Within each Focus Area, data will be collected through multiple sources and by multiple participants including Foundation staff, COI members, BEF (or its successor backbone/intermediary organization), partners,

and/or consultants, and by a seasoned and multi-faceted documenting agency who will need to provide the skills and experience that may not be present within the other participants.

The five Focus Areas are:

- *Environmental Quality* (indicators across Puyallup Watershed that impact the water quality of Puget Sound)
- *Community Capacity* (degree of leadership, social infrastructure, and organizational sustainability)
- *Social Impacts* (behaviors and attitudes of local communities, affected industries or business sectors, Community of Interest members and constituencies; as well as the political and regulatory environment)
- *Public Awareness* (understanding and awareness of environmental issues directly impacting Puget Sound; and knowledge of the PWI)
- *The Puyallup Watershed Initiative* (internal structure, process, decisions, activities, knowledge transfer, etc.)

It should be noted that these Focus Areas have been created in order to best organize and understand the broad range of information sources that will be accessed through this project. Once collected and analyzed, the information gathered from these separate Focus Areas will be translated into “content packages” and then integrated into cohesive and audience-appropriate documentation products, and disseminated to key audiences.

1. Collect

The first step of Active Documentation is to define and collect quantitative and qualitative data. The ‘universe’ and taxonomy of information that will be collected needs to be defined early in order to produce the most useful and inclusive results throughout the process. This begins with establishing the avenues or sources of information, the methods of collection and a system of organizing and archiving the information.

It is critical that the information collection process begins as early as possible in order to create a baseline against which progress can be measured. However, the process also needs to be flexible enough to allow for adjustments, additions, and realignments over the course of the Initiative — allowing for the Foundation to respond to innovative ideas, communication opportunities, structural changes and other factors that are likely to emerge as the project evolves. It should be noted that “data” is used throughout this report to include quantitative and qualitative information, reflecting the known desired impacts of the documentation/evaluation itself (as described above) with the assumption that new (or amended) desired impacts will likely be generated.

Focus Area: Environmental Quality

(See Appendix for additional information)

The Puyallup Watershed Initiative is framed to support the creation of broad-based community vision and to inspire action around preservation and protection of the watershed, ultimately improving the water quality within the Puget Sound. The measuring of pollutants entering the Sound is perhaps the most demonstrable indicator of progress in this regard. But within that category, there are endless variables, including related metrics, competing schools of thought, and multiple players.

What to Collect

The Environmental Quality Focus Area will provide some of the most traditional hard data in the documentation project. This data should include an array of measurements — from the amount of pollution entering the Puget Sound through the Puyallup Watershed; to the level of biodiversity throughout the Watershed; to the salmon population and the state of their habitats; to the amount of land being

used for working forests, for agriculture, or for aquaculture; to the number of low-impact developments vs. the number of traditional developments being built — to name just a few.

How to Collect

Given the scope and scale of the potential data available in this Focus Area, the early identification and prioritization of these data categories — and how the Initiative hopes to impact them — will be critical. While appreciating the potential for debate and the desire for consensus among various PWI stakeholders regarding these indices, the sooner that agreement about these baseline indicators can be reached, the sooner usable information can begin to accrue.

It is anticipated that much of this collection will occur either by or in partnership with the various COIs, such as the Agricultural Roundtable, the Water Quality group, and others. While gathering this information might also involve contracting with an appropriate, independent institution, the documenting agency should be a primary recipient of this information.

In addition, a review of pre-existing data collection efforts in the region should be undertaken, along with establishing a system or calendar for the periodic review of these external efforts.

Focus Area: Community Capacity

(See Appendix for additional information)

The PWI has been explicit in its theory of change — basing the Initiative’s work on fostering and supporting collaborative and community-based efforts as the most effective way for TRFF to make a lasting impact on the Puget Sound. Thus, strengthening the capacity and building the passion of the diverse communities of the watershed is a core function of the Initiative. At the moment, community capacity building is anticipated to take place primarily within the COIs, and thus much of the documentation in this Focus Area will center on the COIs. However, the documentation project should also gather supplemental information related to changes in community capacity and public perception external to the PWI and the COI structure.

What to Collect

To understand the Initiative’s impact on community capacity, a range of qualitative and quantitative indicators should be considered. These should include metrics such as the number of local leaders who express a commitment to stewardship

(within COIs and beyond); evidence of political and community leadership beyond COIs; collaboration among and between pre-existing and new organizations, specifically within and among COIs and within and between local nonprofit/for-profit/public sector organizations; proof of “authentic” engagement of culturally-, economically-, educationally-, and geographically-diverse communities via (or within) the COIs; “authentic” engagement of people not previously active in community activities (within COIs and beyond); number of people involved in volunteer activities (sponsored by COIs and other organizations); sustainability of COIs and other organizations throughout the Puyallup Watershed (including review of budgets, income, expenses, resources, consistency of membership, etc.); number of organizations participating in COIs; and capacity-building trainings offered by TRFF, and participation by COIs and others in those activities.

In addition to this hard data, qualitative data regarding the Communities of Interest should also be collected. This includes the stories of the people involved in this effort — and why they are involved – the structure of the organizations, the dynamics within and between the Communities of Interest, their progress or challenges in reaching common agendas, their decision making processes, and their methods of conflict resolution.

How to Collect

As the COIs become viable entities, part of their mandate should be to monitor and provide information regarding any changes to the capacity of the COI itself, the member organizations, and their broader community of constituents. This can be accomplished in a variety of ways — through survey tools which can be created especially for the PWI effort, through annual interviews conducted by the documenting agency, and through standard information gathering processes associated with TRFF grant applications and grantee progress reports (which should be reviewed by the documenting agency to ensure this information can be captured in the most efficient and user-friendly way; non-PWI grant applications to TRFF can also be included in this review to expand the sample and to allow for possible internal / external Initiative comparisons).

This process should be coordinated with an annual survey of all COI members to be completed as individuals, with a separate survey going to participating organizations with an eye toward uniformity and avoidance of repeated efforts — the goal being to better understand the impact of participation in the PWI on their organizational direction. This survey should provide a wide range of information — again coordinated with the PWI grant application / progress reports – on staff and constituency demographics, programmatic focus, staffing size, staffing changes, as well as suggestions for next steps.

Complementing this information gathering should be annual interviews conducted by the documenting agency with multiple members of each COI. Whenever possible, there should be a consistency of two organizational interviewees, even if they cease to participate in a COI or the PWI. Other interviewees should be selected with input from the intermediary/backbone organization. These interviews should uncover stories of real partnerships among and between COIs, how and why partnerships developed, the results of such collaborations, or the obstacles and reasons why such partnerships have not emerged.

Annual one-on-one interviews should also be conducted with the lead personnel of the intermediary/backbone organization, as well as with TRFF’s PWI program team, management team, and select board members. (This and other processes should be designed to collect information regarding multiple Focus Areas when possible.) Between 20 and 25 additional community leaders should be identified each year in order to create a pool of 40 to 50 individuals who can be consistently interviewed every two years for the 10 year life of the Initiative.

In addition, the fundamental record keeping of COIs — including meeting agendas, meeting minutes, programmatic “hot topics,” attendance information, budgets, etc. — will provide the documenting agency with an excellent knowledge base regarding organizational capacity. Observation of COI meetings, and surveys and evaluations collected from participants at all PWI convenings, trainings and other related events when appropriate. The format and information gathered should be as consistent as possible, yet also allow for qualitative information such as “What were the goals of the event? What was learned? What could have been done differently?”

There should also be a bi-annual poll of influence-makers across the region (many of whom are unlikely to be directly involved with the PWI). A “universe” of approximately 400 responders should be established, with the polling conducted as either by phone or via electronic outreach. This will gather perspectives and information related to the perceived relative importance of the Initiative, select COI members and activities, and watershed-related issues as a whole in comparison with other issues facing local decisionmakers. A series of biannual interviews with 20-25 randomly selected influentials from the same pool of 400 should be conducted to gain deeper information and qualitative assessments on these topics. Much will be learned from this aspect of the documenting agency’s work that can help PWI as it grows and matures.

In addition to COI-related stakeholders, community and political leaders should also be included in this assessment. Any public statements, formal positions

taken on relevant policies, or notices in traditional and new media should be tracked and reviewed for relevance — including their understanding of and position on watershed-related issues, knowledge of the PWI, and relationships with COIs and their constituencies.

Focus Area: Public Awareness

(See Appendix for additional information)

For many residents in the region, there is a significant lack of awareness, understanding, and connection when it comes to watershed-related issues. The term ‘watershed’ itself is inherently counter-intuitive and can even contribute to the sense of an impenetrable scientific realm in which it exists – far from neighborhoods and communities and families. Tackling this gap in public awareness will be one of the Initiatives biggest challenges — because that is the lynch-pin that will allow for individual behavioral changes, community buy-in, and actionable political will down the road.

What to Collect

To understand change in public awareness of issues that impact environmental sustainability, a range of qualitative and quantitative indicators should be defined and tracked. These include baseline knowledge about the Puyallup Watershed and especially its critical importance to the economic and environmental viability of the region and communities. The documentation project should specifically track the levels of awareness regarding the inter-connectivity and the impact that exists between different elements and regions of the vast watershed as well as the Puget Sound; the opinion that local residents have regarding their own water quality and the water quality of the Puget Sound — and even whether they believe those to be linked; public support of ‘watershed-centric’ public policies; level of commentary on news sites and social media sites regarding watershed-related issues; as well as levels of awareness regarding the Foundation, the PWI, and COI members and programs.

Another key indicator to monitor will be the level of awareness among students and if/how an Initiative-supported environmental education curriculum can foster a greater, workable knowledge base among students from pre-K to K-12 to higher education.

How to Collect

Throughout this project, the information gathering process — and in fact some of the information itself — will overlap between the Focus Areas delineated in this report. For example, many of the same information collection tools employed for the Community Capacity Focus Area should be repurposed for the Public Awareness information gathering, such as the survey and interviews with COI members, interviews with the intermediary/backbone organization, surveys of participants at all PWI events, community poll of influentials, interviews with community leaders/influence-makers, and media audits.

Any materials designed for public consumption by the Communities of Interest should be archived and reviewed to understand the goals, content, and impact.

One-on-one interviews should be conducted with a select group of educators, families, and students — revisiting the same individuals bi-annually over the life of the Initiative. This can also provide compelling photographic and video records as part of the process.

Local and regional elected bodies should also be monitored regularly with regard to how issues related to the Puget Sound are treated.

A strong Online presence will undoubtedly be a key component of a comprehensive communications plan for the Initiative. And all Initiative-related websites should not only deliver information, but also serve as a tool for gathering information. Through data such as traffic metrics, volunteer sign-ups, mailing list development, social media sharing, and comments and feedback numbers, Initiative-related websites can provide vital information about the public perception of watershed issues, the PWI, and its programs. The sites can also be used to conduct less-than-scientifically-rigorous but still highly informative public surveys around the awareness, understanding and connection to watershed issues among the general public.

Focus Area: Social Impacts

(See Appendix for additional information)

Ultimately, the behaviors of individuals and the aggregate community will have the greatest impact on Puget Sound’s water quality. It is recommended that the documentation project gather information related to personal behavior and preferences — public attitudes and understanding about sustainable behaviors; desire or resistance to changing personal and/or industry-wide practices; receptivity to mandatory, community-wide policies, etc.

Of course, one of the key levers to encouraging collective behavioral changes is through public policy — which opens up an expansive realm of possibilities and challenges.

What to Collect

To create a framework for this Focus Area, it is recommended that TRFF begin by asking each COI to craft a “Legislative Wish List” — What would the ideal public policies affecting your Community of Interest look like? What are the best practices that would support the preservation and protection of the Puyallup Watershed in agriculture, forestry, parks management, etc.? These lists could be distinct from and more ambitious than any actual targeted goals established through the COIs and the Initiative. These wish lists can then be turned into polling questions to gauge their receptivity by constituents. The same questions should be asked of the COIs every two years in order to track any changes (or stagnancy) in attitudes toward these behavioral changes

Following this, it will also be important to collect information related to the demonstrated political will toward efforts in this arena, including but not limited to all proposed watershed-related policies; relevant budget proposals and negotiations; election platforms; voter support for measures to improve water quality; public support for water quality issues by a broad range of stakeholders; and “unlikely” collaborations and conflict resolution along these lines between and among COIs.

The documenting agency should be able to glean numerous stories from all of the Focus Areas — stories of individuals and how they connect to the programs and the efforts to preserve and protect the Puyallup. However a keen eye will need to be kept on this particular Focus Area to identify and track the shifting of perceptions — from individuals, organizations, industry groups, or communities — regarding the evolution of attitudes around sustainability and how that can influence behavior, practices, and results.

How to Collect

As above, many of the tools for gathering information in this Focus Area will overlap with other Focus Areas. Information should be collected through carefully constructed interviews and surveys of COIs and community leaders, and also by tracking issues addressed by the COIs through the auditing of communications, traditional and new media, select polling and information gathered through Initiative related websites.

To gather relevant data on aspects of importance to individual COIs, it will be important to work with them to develop a probing, quantitative, and qualitative system for direct information-gathering.

Finally, the tracking of key votes in local and regional government bodies will shed light on changes to regulations, policies, and budgets.

Focus Area: The Initiative

(See Appendix for additional information)

The overarching framework for all of this information is of course the Initiative itself. And collecting, archiving, and analyzing the data related to the structure and the progress of the Initiative is one of the Documentation Strategy’s key goals.

What to Collect

Embedded in all of the information and the data collected in the previous categories are the values, strategies, and goals of The Russell Family Foundation in relation to this Initiative. How those ideas translate into a 10-year grantmaking program should be at the heart of the information gathered in this Focus Area.

It will be the highly detailed hard facts as well as the softer, more nuanced information that will bring the full story of this project to life in ways that “document” and inform; preserve and expound; and shed light to enable other organizations and individuals to understand how the many parts of the Initiative were integrated to form an impactful whole.

The dollar amounts awarded to PWI grantees; the resources expended on PWI infrastructure; the number of individuals attending and organizations represented at all PWI events; the number of mentions in the media; the miles traveled by staff on PWI related activity; the staff hours devoted to establishing each Community of Interest — all of these numbers will need to be captured, archived and analyzed. The documentation project should also create a record of the decision making processes and decision-trees employed by the Initiative; the challenges and methods of conflict resolution; the external perceptions and misperceptions of the Foundation’s intentions and the Initiative’s goals; the resulting communication strategies; and the long-term impact this program will have on the Foundation’s budget, its other grantmaking programs and grantees, its key partners (such as the backbone organization), the Foundation Board and its staff.

Creating not just a record, but an illuminating, instructive and compelling narrative of these factors will comprise one of the core documents of this project.

How to Collect

Beyond all the recommended methods noted up to this point, the documenting agency should perform entrance / exit interviews with all TRFF staff, relevant BEF staff, and randomly selected board members. These oral histories combined with those of the select COI members (noted above) will be crucial in telling the full story of the Initiative.

As an offshoot of this larger story, a Findings Report should be completed every two years based on the information gathered through these and other interviews, using the 2013 Findings Report produced by FTA as a baseline for comparisons.

Of course, the archiving, organizing, and analyzing of Initiative-related documents and records will be another core documenting function. Planning documents, background memos, presentations, conference notes, final publications, etc. should be tracked, reviewed and cross-referenced via a user-friendly but robust archiving system.

RECOMMENDED DELIVERABLES¹ (DIRECTLY RELATED TO COLLECTING DATA):

- Design of COI survey — information fields and survey tools, including those that can be used independently and those that should be incorporated into standard Foundation grantee applications and documentation
- Design of survey for participants at PWI convenings
- Design of survey template for participants at other activities (both PWI- and non-PWI related)
- Interactive Website — tightly coordinated with the communications strategy, creating an Online presence that can serves as both a tool to collect data from the COIs, stakeholders and the general public, and deliver information to key audiences
- Design of Initiative information archive system
- Design of community poll (telephone and/or electronic)
- Evaluation forms for TRFF trainings

¹ Note, there are recommended deliverables listed at the end of each of the strategic documentation actions, i.e. Collect, Analyze, Translate, etc.

2. Analyze

Once collected, the data needs to be analyzed. For the anticipated volume and various formats of information that will be collected to be of most use, it will need to be understood and analyzed independently while also cross-referenced and assessed through a variety of lenses. The various trends in individual variables as well as the relationships between and among the components of the Initiative will need to be established, as will the information related to the broader programmatic landscape beyond the PWI.

One of the challenges of this analysis will be to illustrate how the PWI has made an impact over time — or how it has attempted to have an impact — on the key indicators identified. In some cases, it will be possible to simply reflect the quantitative data in order to illustrate demonstrable changes. The documenting agency, however, will not only need to critically analyze and illuminate quantitative “hard” data, but should also provide qualitative analyses to highlight the salient connections between hard and soft data, as well as weave those findings into a meaningful, realistic portrait of the Initiative. This will not only provide an accurate historical record, it will also help shed light on early decisions, inform new decisions, uncover opportunities or obstacles, and provide insights for the ongoing development of the Initiative.

For example, the relationships and relative success of various COIs could be assessed through a filter of organizational network theory, to track the number of contact points and overlaps between member organizations. Actor network theory could be applied to help track the relationship between concepts such as ‘water quality,’ ‘outdoor recreation,’ or ‘the environment’ and how these ‘actors’ affect part of an actual social network (such as local communities or the COIs themselves). Or the COIs could be compared against the principles of community democracy theory such as the “Dynamics of Difference” to see how conflict resolution can be addressed to reach consensus.

An analysis of the information collected to measure *Environmental Quality* should include:

- A clear rationale as to why specific metrics were identified
- What precisely was measured and how the results were derived
- Disclosure, introduction, and qualification of any participating experts or collaborating agency

- Potential pros and cons of information gathering and analysis methodologies
- Results at particular moments in time along a continuing spectrum of related information
- Changes to the measurement over time and in comparison to anticipated/ desired changes
- Data trends across multiple axes
- Other internal or external factors that may have influenced the results (including policy changes, new regulations, building developments, community activities, etc.)

An analysis of the information collected to measure and understand *Community Capacity* should contribute to a greater understanding of:

- Local leadership development, associated with and independent from PWI activities
- New and increased leadership in the region and how that impacts the PWI efforts and the broader community
- Potential long term impacts of new leadership on the political structure and community networks, locally and regionally
- Benefits and challenges of collaboration among COI organizations, especially among and between COIs and the membership of COIs
- Challenges and opportunities specific to intersection of diverse communities, including cultural, economic, educational background, geographic, political and ethnic diversity
- Effective strategies that are emerging as a result of PWI’s efforts to engage people not previously active in the community
- Strategies, successes and obstacles to enhancing the sustainability of COIs and other organizations throughout the Puyallup Watershed

An analysis of the information collected to measure and understand *Public Awareness* should contribute to a greater sense of:

- The level of awareness, understanding and connection when it comes to watershed-related issues among targeted communities and the general public
- The general understanding of the watershed’s economic and environmental importance to the region
- Levels of awareness regarding the inter-connectivity between different elements the watershed as well as the Puget Sound
- The opinion that local residents have regarding their own water quality and the water quality of the Puget Sound
- Awareness of PWI activities and related organizations

- The correlation between understanding of the watershed’s role and knowledge of PWI activities
- Opinion and trust of various media as it relates to the appropriate and impartial coverage of watershed related issues
- The priority given to watershed issues by government agencies, elected officials and community leaders
- Interest levels and availability of ways to become involved in watershed related issues
- The role that K-12 schools and higher education play in public awareness of watershed issues
- The impacts of these issues on students and parents

An analysis of the information collected to measure and understand *Social Impacts* should contribute to a greater understanding of:

- Public receptivity to changes in individual behavior to protect and preserve the watershed
- Opinions about sustainable best practices for industries and whether these should be voluntary or mandatory
- Shifts in the demonstrated political will toward efforts in this arena, by communities, organizations and government entities
- Changes to watershed-related policies, budgets, election platforms — locally, regionally, and statewide;
- An assessment of the PWI’s influence on these public perceptions
- Ways in which the COI model results in collaborations and conflict resolution — and the impact of such on behaviors (among industries and individuals)

An analysis of the information collected to measure and understand *the Initiative* itself should be archived to create a record — but also be readily accessible to assist in real-time decisionmaking. While each of the Focus Areas above will contribute crucial information about the efficacy and impact of the Initiative, there is also a distinct arc of information that will need to be collected and analyzed specific to the inner workings of the Initiative. As such, the information needs to be analyzed in order to understand:

- Extensive and systematic hard data collection related to the operation of the Initiative
- The decisionmaking processes and decision trees of the Initiative, and subsequent outcomes

- The perceptions and misperceptions of the Initiative — of the Initiative — from the Board, staff, and intermediary, as well as partners and the broader public
- The impact of the PWI on TRFF as a whole, on its non-PWI grantees and its key partners
- Challenges and successful strategies related to attracting funds and leveraging partnerships
- Challenges and successes associated with generating public awareness about the Initiative itself
- Challenges and methods of conflict resolution within the PWI
- Administrative challenges and best practices as related to the collaborative grantmaking model and COI operations
- Expectations and realities related to the Initiative
- Strategies, successes, and challenges related to the transfer of PWI-based knowledge (beyond local partners)
- The PWI within the broader context (local and regional programmatic landscape)
- How the Communications Plan integrates with the Initiative and the Foundation as a whole

RECOMMENDED DELIVERABLES (SPECIFICALLY RELATED TO ANALYZING DATA):

- Results/Analysis of COI survey
- Results/Analysis of community poll
- Results/Analysis of key votes
- Review of internal correspondence, documents, and assessment memos
- Media analysis

3. Translate

After analysis, information needs to be translated and crafted into understandable and audience-appropriate “content packages.”

These “packages” should include narratives, personal stories, organizational histories, programmatic timelines, network maps, graphic representations and charts, key facts, findings, and polling results to name just a few of the components that should be used to create documentation products.

Taking the analyzed information and transforming it into salient and usable formats is the next step in an Active Documentation Strategy. This amounts to translating the content into narrative and graphic elements ready to be used in a variety of formats, tools, publications, and electronic materials appropriate for specific or multiple audiences.

It should be noted that at this point in the Documentation Strategy, the organizing principle of the Focus Areas becomes less critical. While there may certainly be opportunities and reasons to create documentation or communications products that focus primarily on Environmental Quality or Community Capacity, for example, these Focus Areas will not be the driving organizing principles for the final documentation or communication products. Instead, this information should be combined and presented in the most useful, efficient, and compelling ways necessary to convey the desired information to the appropriate audiences.

To that end, the resulting analysis of the quantifiable hard data emerging from the Environmental Quality Focus Area will be able to be translated into narrative content. This could describe, for example, the specific demographics of several upstream communities and how their amended behavior may be impacting the measurable pollutants at certain points in the Puyallup River; or the programmatic strategies that brought several farming concerns into harmony over run-off issues, backed by the demonstrable amounts of organic vs non-organic materials compared over a certain time frame. Combining the potential impacts of public perception, policy changes, educational efforts to encourage behavioral changes and any resulting environmental metrics will create a rich and comprehensive picture of various elements of the Initiative.

While eager to tell the tale of the Initiative, the documenting agency will need to be highly mindful of the relationship between the efforts of the PWI and how they relate to parallel, pre-existing, continuing, or new efforts also aimed at impacting the quality of water in the Puget Sound. The PWI needs to be seen in a real-world context and be sensitive to external impacts on environmental quality that are (or appear to be) the result of other individual or industry behaviors.

The analysis related to Community Capacity will most likely result in a comprehensive statistical analysis of a broad community of organizations, new and old, that make up the Communities of Interest. That information gathering process should also reveal a wealth of individual stories and potential profiles as existing and emerging leaders and activists convey their experiences in the field and within the structures of the PWI. This should produce compelling first person narratives as well as comprehensive findings that will illustrate how these organizations are applying their selected strategies and adapting to new collaborators and a new funding mechanism. These on-the-ground voices will also be able to convey if and how political will can be generated to effect true policy change and how authentic community engagement can occur and be most useful in reaching specific programmatic goals. Beyond this, stories will emerge that highlight the workings of the COIs, which should include in-depth profiles of particular organizations and individuals.

The resulting analysis from the information gathered through the Public Awareness Focus Area will be integrated throughout much of the documentation projects. As each Community of Interest and the Foundation itself continually tries to move the needle on public opinion and engagement around watershed issues, this information will paint one of the most clear pictures of the opportunities – or obstacles – on the path to success. This information can be rendered graphically or interwoven throughout most narratives. For example, a graphic timeline can show the number of times election platforms include watershed-related issues. In addition, more qualitative pieces can help illustrate Public Awareness, including findings based on interviews and stories of individuals (over time) who have been engaged by public education campaigns. A handful of students and their families, for example, who have taken part in a progressive curriculum on watershed issues over the years can be periodically interviewed to see what, if any, the affect of these education programs have had on their opinions and behaviors.

The Social Impacts Focus Area will generate stories that can track changes in an individual’s behavior, of potentially how broader changes have been tracked in industries or communities. The information can be illuminated in part through graphics showing the number of times key policies are introduced and also show the results of votes on environmental policies. These potential combinations of statistical data and personal transitions can also shed a light on how the Communities of Interest are engaging with their core constituencies.

The analysis of the Puyallup Watershed Initiative Focus Area will create some of the core data points that will support the ultimate assessment of the Initiative, which can include a visual and a narrative cost/benefit representation of the Initiative’s trajectory, a timeline of the Initiative in relation to concurrent related programmatic efforts, regional current affairs and even national current affairs and environmental benchmarks, in order to place the Initiative in the broadest context possible.

This information will also lead to a set of evolving questions for the Board and staff to engage in authentic self-evaluation, review their decision making and plot any course changes going forward.

RECOMMENDED DELIVERABLES (RELATED SPECIFICALLY TO TRANSLATING DATA)

These elements should be used to create:

- Written narratives of people, COIs, programs, activities – including progressive (multi-year) stories, especially to show impact of school programs
- Documentary-style photography, and video to accompany and embody the narratives (e.g., creek restoration, working forests, etc.)
- PWI Process, in narrative and informational graphic form, potentially including: Relationship/Network Map of TRFF and the PWI; Process/ Decisionmaking; Internal/External Timeline
- A network map of the Communities of Interest
- An illustration of overlapping program areas, partners, constituencies, and spheres of influence among the COIs
- A comparative chart showing decisionmaking processes in various COIs
- Programmatic Landscape, in narrative and informational graphic forms, placing the PWI into a broader context
- Matrix of COI Indicators over time
- COI Update, including narrative and graphic representation of legislative wish lists cross-referenced with the Matrix of COI Indicators noted above
- Findings based on recurring interviews and other information gathered
- Summary of data (with back-up as appropriate)
- Summary of results

4. Create

The content packages should be assembled to create a variety of creative documentation products in an array of formats – which might include print, video, online content, presentation media, etc., (many of which could overlap or dovetail with communication documents).

After translating the analysis into components that reflect the range of the Initiative and also the inter-relationship among the parts of the Initiative and the broader landscape, materials should be created to maximize the value of the documentation – in the short- and long-term.

At this point it is important to reiterate the close coordination that should occur between the production of these documentation materials and a well-thought-out Communications Plan — both for the PWI and TRFF. By presenting the complexities of the data analysis in professional, easy-to-follow print and electronic formats, the wide range of PWI audiences (see next section: Disseminate) can become engaged and informed about key issues – satisfying many of the original goals of the documentation project.

These final products should include a variety of formats — including summary reports, video narratives, interactive websites, informational posters, interactive presentations — targeted at a variety of audiences — from the Board to the general public. And they will satisfy the core goals of this effort by providing:

- A factual and accurate historical record of the Initiative;
- Information to assist real-time, informed decisionmaking;
- Evidence to elicit support from key partners, including potential co-funders; and
- An embodiment of the Foundation’s commitment to transparency and community accountability.

With the wealth of information generated through this process, it will take a keenly organized and deeply experienced documenting agency to see the big picture, connect the dots, find the compelling stories, and craft persuasive and attractive final products to accurately and comprehensively tell the story of the Puyallup Watershed Initiative in the manner that it deserves.

Most, if not all, of the materials should be created with an eye toward multiple publication formats, including traditional printed materials, websites, or social media. It may be that there are instances when specific materials are created to respond to inquiries or tightly focused needs. In these cases, materials should be

crafted from a set of elements that provide a full, integrated picture – while still providing the specific information requested.

As the Initiative progresses over time, there will undoubtedly be consistent narrative threads that will emerge and will need to be captured along the way and tied together toward the end. These narrative threads should be echoed through parallel progressive stories that will follow individuals, organizations, and communities touched by the Initiative over its ten years. Additionally, there should be ‘snapshot’ profiles of individuals that illustrate moments in time of the Initiative, its goals, and its impact along the way.

Two core products recommended include two comprehensive Story of the Initiative documents, occurring in Year 5 and Year 10 of the Initiative. These should include narratives, documentary photography, graphic elements, and potentially, a companion video feature available online.

In addition, a Full Report should be compiled biennially – with an Interim Report produced in off years – that compiles the most salient and useful information gathered through each Focus Area and combined and presented in visually appealing, informative, professional, and engaging formats.

In coordination with the Communications Plan, an Initiative focused website should also be created to serve as not only a delivery vehicle and publication format for significant portions of the documentation project, but (as noted earlier) to also serve as an information gathering tool for the PWI and for the Communities of Interest.

Throughout the project, there will also inevitably be occasions to leverage this information in order to take advantage of communication or outreach opportunities that may arise, including speaking engagements, conference panel presentations, or targeted white papers on specific strategies or program areas.

RECOMMENDED DELIVERABLES (MATERIALS AND TOOLS SPECIFIC FOR DISSEMINATION — print and electronic formats, including PowerPoint versions for presentations as appropriate):

- The Story of the Initiative: Years One through Five (text/ photography/ video)
- The Story of the Initiative: Years One through Ten (text/ photography/ video)
Each should include: stories of people, COIs, programs, activities – including progressive (multi-year) stories
- PWI Full Report (biennial)
Including: Series of Diagrams and Infographics to illustrate key aspects of PWI; Relationship/Network Map; Process/Decisionmaking narrative and diagrams; Internal / External Timeline; Programmatic Landscape;

PWI Process; Matrix of COI Indicators over time; COI Updates; Findings; Summary of data; Summary of Initiative “results” (summary from data collected and analyzed); Stories / Profiles

- Executive Summary (or mini-version of PWI Full Report with Select Stories/ Profiles/Graphics)
- PWI Interim Report (alternate years, initiated one year after first Full Report issued; contents similar to Full Report, but without data summaries and findings)
- Executive Summary of PWI Interim Report, with Select Stories/Profiles/ Graphics
- Occasional White Papers on key issues or topics, as needed
- Interactive Website: this could be a stand-alone site or a section of the TRFF site; could include: COI specific sections (or blogs) to serve as COI information clearinghouse; Simple video tours of working areas, updates; Calendar of PWI events; Media tracking, news room; Personal stories of activists or volunteers; Resources for general public, including FAQs, maps of forests, creeks, and farms relevant to each COI; Tracking of relevant political activities; Volunteer opportunities/mechanism to participate; Online surveys or quizzes which can act as informal information gathering; Social media components such as Twitter feeds or relevant content aggregators.

5. Disseminate

The final documentation products should be disseminated to key audiences. The products disseminated to each audience will best reflect its needs, in terms of frequency, format, and content. Clearly, this aspect of the Active Documentation process will require tight coordination with the broader Communications Plan.

Coordination with the ultimate Communications Plan for the Initiative may be most critical during this phase of the documentation project, as the timelines and dissemination vehicles for both functions should be in close harmony.

While the PWI has the potential to include a huge number of audiences, FTA advises thinking of them in seven categories:

- Internal
- COIs/TRFF Grantees
- Funders
- Community
- Government
- Media
- Beyond the South Sound

Each is defined by its primary reason for providing documentation (as part of a full and focused Communications Plan).

AUDIENCE	Primary Reason to Provide Aspects of “Documentation” to Key Audiences				
	informed decision-making	historical documentation	inspire support	leverage funds	connections, coordination, reputation
INTERNAL					
Board, Staff, Initiative Consultants/Partners	•	•			
COIS / TRFF GRANTEES					
Communities of Interest — all official participants			•		•
FUNDERS					
Co-funders (committed)				•	•
Northwest / Environmental Philanthropic Communities				•	•
COMMUNITIES					
Puyallup and South Sound Environmental Communities			•		•
Puyallup and South Sound Tribal Communities			•		•
Puyallup and South Sound Business Communities			•	•	•
UWT and other higher education institutions				•	•
General Public within Puyallup Watershed and South Sound			•		
GOVERNMENT					
Local Governments (city/regional) within Puyallup Watershed and Sound and government leaders representing region (federal, state)			•	•	•
MEDIA					
Local and Regional Media (traditional and new)			•		
BEYOND THE SOUTH SOUND					
Communities working in watersheds	•		•		
Researchers engaged in social dynamics and ecological studies of watersheds	•			•	

	Audiences						
MATERIALS / TOOLS	Internal	COIs/ Grantees	Funders	Community	Government	Media	Beyond South Sound
Story of the Initiative (every 5 years)	•	•	•	•	•	•	•
Full Initiative Report (biennial)	•	•					
Executive Summary Full Initiative Report (biennial) with select stories/profiles/graphics	•		•	•	•	•	•
Interim Initiative Report (biennial)	•	•					
Executive Summary Interim Initiative Report (biennial) with select stories/profiles/graphics	•						
Occasional White Papers	•		•	•	•		•
Responses to specific inquiries (combination of elements)				•	•	•	•
Web-based information		•	•	•	•	•	•

6. Engage

Ideally, a comprehensive community engagement strategy would be developed, and a key component of that strategy would be informed by — and in turn, inform — the documentation process. Given the level of resources that such a plan would require, the Active Documentation process proposed has been conceived to create opportunities to engage the community to some degree, by proposing opportunities to discuss results and gather input.

Once the documents have reached the intended audiences, partners and the broader community will be able to share this information more widely, as well as return feedback that can then be incorporated into the ongoing process. This feedback loop will be used to discuss results, gather input, and create more effective iterations of the feedback loop itself in coordination with the Initiative community engagement strategy.

Ideally, TRFF would develop an initial five-year plan to position the Foundation’s efforts in a tightly coordinated geographically-based community engagement program. This program would cross COI lines, and focus on the lifting up the common agenda of the PWI as a whole – stepping back from parameters of individual COIs and offering space for meaningful input and feedback for the Foundation. This effort should be explored through an engagement strategy tied to, but distinct from, the documentation recommendations noted in this report.

One method could be a series of PWI-wide stakeholder sessions to be held over a 2-month period every 2 years. These sessions would take into account the learnings gleaned from the staff, the COIs and from the documentation process and craft a responsive set of culturally appropriate engagement activities that could speak to the challenges or progress that has emerged from the preceding two years. The exact nature of the engagement should be carefully thought through and designed to meet the needs of the particular communities. This engagement should be seen as a key component of the evaluation, as well as a programmatic piece of the Initiative that could be used to build consensus around common goals, increase public awareness, and ultimately influence behavior.

APPENDIX



COLLECT

What information to collect, who should collect it, how it should be collected, and how often

WHAT	WHO	HOW	FREQUENCY
ENVIRONMENTAL QUALITY			
Water Quality indicators (TBD)	Partners / Consultants / Intermediary / COIs	• TBD	TBD
Biodiversity Indicators (TBD)		• TBD	TBD
Forests / Agriculture / Aquaculture Indicators (TBD)		• TBD	TBD
Low-impact developments vs. the number of traditional developments built	Consultant / Partner/ COI	• TBD	TBD
COMMUNITY CAPACITY			
Number of leaders who express commitment to stewardship (COIs and beyond)	Documentarian	• COI Survey • Interview(s) with Intermediary • Interview(s) with TRFF	Annual
Evidence of political and community leadership beyond COIs	Documentarian	• Traditional / New Media Tracking (electeds’ positions, election platforms, etc.) • Community Poll • Interview(s) with Intermediary • Interview(s) with TRFF	Ongoing Bi-Annual Annual
Collaboration among organizations	Documentarian	• COI Interviews • Interview(s) with Intermediary	Annual
Engagement of culturally-, economically-, educationally-, and geographically- diverse communities in COIs	Documentarian	• COI Survey • COI Interviews • Interview(s) with Intermediary	Annual
Engagement of people not previously active in community activities	Documentarian / Intermediary	• COI Survey • Convening Participant Survey • PWI and non-PWI Activities Participant Survey • Observation at activities • Community Leadership Interviews	Annual Ongoing Bi-Annual
Number of people involved in volunteer activities (sponsored by COIs and other organizations)	Documentarian	• Community Leadership Interviews • Interview(s) with Intermediary	Bi-Annual Annual
Sustainability (including non-TRFF funding) of COIs or other organizations involved in Puyallup	Intermediary / Documentarian	• Grant Applications (PWI and other TRFF) • Progress reports from COIs to Foundation and other TRFF grantees • COI meeting agendas, minutes, hot topics • Interview(s) with Intermediary • Interview(s) with TRFF	Annual Ongoing
Number of organizations in COIs	Intermediary	• COI Survey	Annual
Capacity-building trainings offered by TRFF, and participation by COIs and others	TRFF / Intermediary	• Tracking • Evaluation forms (trainings)	Ongoing
Changes over time to individual community members and local organizations	Documentarian	• Interview / Photograph select group of community members / leaders (same each 2 years)	Bi-Annual

WHAT	WHO	HOW	FREQUENCY
PUBLIC AWARENESS			
Knowledge of the existence of the Puyallup Watershed, and understanding of its economic and environmental importance to the community (and how actions in one part of watershed impact other parts of watershed, as well as the Puget Sound)	Documentarian	<ul style="list-style-type: none">Community PollCommunity Leadership InterviewsCOI SurveyCOI InterviewsInterview(s) with Intermediary	Bi-Annual / Annual
Frequency of commentary in traditional and new media	Intermediary / Documentarian	<ul style="list-style-type: none">Traditional / New Media Tracking	Ongoing
Frequency as election topic or goal for electeds, city councils, etc. (“watershed-centric” political activity)	Intermediary / Documentarian	<ul style="list-style-type: none">Monitoring of local/ regional elected government bodies	Ongoing
Knowledge of PWI; COIs; other non-PWI (but related) programs; and ways to get involved	Documentarian	<ul style="list-style-type: none">Community PollCommunity Leadership InterviewsCOI InterviewsInterview(s) with Intermediary	Bi-Annual Annual
Impact on schools and curriculum – pre-K, K-12, and higher education	Documentarian	<ul style="list-style-type: none">Interviews with schools and educatorsInterviews / photography / video of select group of students and teachers (same each 2 years)	Bi-Annual
Penetration of information by TRFF and COIs	TRFF / COIs	<ul style="list-style-type: none">Tracking of TRFF and COI materials disseminationPWI and Non-PWI Activities Participant SurveyCOI Survey	Ongoing Annual
SOCIAL IMPACTS			
Industrywide and/or individual behaviors related to aspects of COI work (TBD)	COIs with input from Documentarian	<ul style="list-style-type: none">Develop probing, quantitative, and qualitative system for information-gathering	TBD
Political will and changes in policy that require changes in behavior	Intermediary / Documentarian	<ul style="list-style-type: none">Tracking of policies / regulations (measuring against COI “legislative wish lists”)COI SurveyProgress reports from COIs to Foundation and other TRFF granteesCOI meeting agendas, minutes, hot topicsCOI InterviewsInterview(s) with IntermediaryCommunity Leadership PollCommunity Leadership Interviews	Ongoing Annual Bi-Annual
Voter support for initiatives that improve water quality	Intermediary / Documentarian	<ul style="list-style-type: none">Tracking of key votes in local and regional government bodies	
Support for water quality issues by a broad range of stakeholders	Intermediary / Documentarian	<ul style="list-style-type: none">COI InterviewsInterview(s) with IntermediaryCommunity Leadership InterviewsInterview(s) with TRFF	Annual / Bi-Annual
“Unlikely” collaborations and conflict resolution between and among COIs	Intermediary / Documentarian	<ul style="list-style-type: none">COI InterviewsInterview(s) with IntermediaryCommunity Leadership InterviewsInterview(s) with TRFF	Annual / Bi-Annual
Changes in attitudes and actions	Documentarian	<ul style="list-style-type: none">Interviews / photography / video of select group of industry leaders / electeds / community members (same each 2 years)	Bi-Annual

WHAT	WHO	HOW	FREQUENCY
THE INITIATIVE (“The Story of the Puyallup Watershed Initiative — an Overview, Over Time”)			
PWI within the Broader Context	Documentarian	<ul style="list-style-type: none">All of the above... and...Gathering of information related to programmatic, organizational, and policy contextEntrance/ Exit interviews for staff, Intermediary, BoardInternal tracking of inquiries, presentations, conferences, publications, etc.Regular review of PWI’s mission and vision by Board and Staff	Bi-Annual
Process, Decisions, Results	Documentarian		Annual
Perceptions / Misperceptions	Documentarian		Bi-Annual
Impact on TRFF, Impact on non-PWI grantees	Documentarian		Annual
Staffing / Intermediary	Documentarian / TRFF / Intermediary		Annual
Budgets	Documentarian / TRFF / Intermediary		Annual
Attracting funds / leveraging partnerships for funding	Documentarian / TRFF		Annual
Traditional and New Media re PWI, issues, TRFF, etc.	Documentarian / Intermediary		Ongoing
Events / Foundation convenings	Documentarian / TRFF / Intermediary		Ongoing
Communication / resolution of conflicts among COIs	Documentarian / Intermediary		Ongoing
Expectations and Reality	Documentarian		Annual
Transfer of knowledge (beyond local)	TRFF		Annual

