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2024

# EQUITABLE COLLABORATION ROADMAP



INSTITUTE FOR  
**Sustainable  
Communities**



**EJ TCTAC**  
Environmental Justice  
Thriving Communities Technical  
Assistance Centers Program

U.S. Environmental Protection Agency  
in partnership with the Department of Energy

Prepared for  
**TCTAC  
Network**

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# PURPOSE

This guide supports organizations who aim to center equity in their partnerships. Each of the seven sections corresponds with the elements of the roadmap for equitable collaboration below.



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## Equitable Collaboration Roadmap

### 1 Identify Objectives and Needs

Understand your objectives and needs and assess what you bring to the table for partners.

### 3 Initial Outreach and Engagement

Create time and space to have initial discussions.

### 5 Formalize the Partnership

Develop a partnership agreement for how you'll work together.

### 7 Sustain and Grow the Relationship

Build trust and co-design the work as partners.

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### 2 Identify Potential Partner

Research what partners might help support your objectives and needs.

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### 4 Joint Compatibility and Equity Assessment

Ensure that your values are aligned on the topics that matter the most for the work.

6

### 6 Implement and Manage the Relationship

Co-design processes for how you'd like to be in relationship with one another.



# STEP 1: IDENTIFY NEEDS AND OBJECTIVES

## DETERMINE OBJECTIVES

- ☐ Clarify your organization's goals for the partnership
- ☐ Ensure these objectives align with your mission, values, and strategic plan

## ASSESS YOUR ORGANIZATION

- ☐ Appraise your organization's current approach to partnerships, and knowledge of the history, existing conditions, issues, and strengths of those that you want to partner with
- ☐ Evaluate your organization's needs and assets
- ☐ Assess organizational biases, and provide training to understand biases, power dynamics, equity, and the impact of colonization and white supremacy on individuals and communities







# STEP 2: IDENTIFY POTENTIAL PARTNER(S)

## RESEARCH AND MAPPING

- ☐ Conduct research to identify potential partners who share similar:
  - Values
  - Objectives
  - Mission statements
- ☐ When applicable, use mapping tools to find organizations working in the same geographic or thematic areas like the [Climate and Geographic Justice Screening Tool](#)\* to find organizations working in the same geographic area

*\*See page 11 for a QR code linked to a full list of online resources.*

## LEVERAGE EXISTING NETWORKS

- ☐ Utilize existing networks, coalitions, and forums to find partners
- ☐ Seek recommendations from stakeholders and community members







# STEP 3: OUTREACH AND ENGAGEMENT

## REACH OUT

- ☐ Initiate contact with potential partners
- ☐ Clearly communicate your objectives, interests, and the potential benefits of the partnership

## TALK TO EACH OTHER

- ☐ Schedule introductory meetings to discuss mutual interests and goals
  - Try to meet in person at a location that's ideal for your potential partner
  - If possible, have food when you meet as a way to “break bread” with one another
- ☐ Listen to their perspectives and understand their needs and priorities.
  - Take the lead on following up with materials, expectations, etc.





# STEP 4: JOINT COMPATIBILITY AND EQUITY ASSESSMENT

## CONFIRM CAPATIBILITY

- ☐ Establish that both organizations have a shared vision for the partnership
- ☐ Discuss and agree on equitable terms for collaboration

## ENSURE EQUITY

- ☐ Set up guidelines so that both parties have equal say in decision-making and benefit fairly from the partnership





# STEP 5: FORMALIZE THE PARTNERSHIP

## DEVELOP A PARTNERSHIP AGREEMENT

## LEGAL AND ETHICAL CONSIDERATIONS

*\*Please note that the recommendations below are optional*

- ☐ Draft a formal agreement outlining the roles, responsibilities, and expectations of each party
- ☐ Include provisions for decision-making, resource sharing, and conflict resolution
- ☐ Ensure the agreement complies with legal requirements and ethical standards
- ☐ Seek legal advice if necessary
  - Lawyers for Nonprofits\* is one potential source for information and assistance



*\*See page 11 for a QR code linked to a full list of online resources.*





# STEP 6: IMPLEMENT AND MANAGE THE RELATIONSHIP

## ESTABLISH COMMUNICATION CHANNELS

- ☐ Set up regular meetings, email threads, and instant messaging to ensure continuous dialogue and feedback
- ☐ Use shared project management tools for faster asynchronous communication while coordinating activities and tracking progress
- ☐ If you're comfortable, offer your phone number to a lead collaborator at your partner's institution, as it is easier for people to call/text about something quick in some cases

## MONITOR AND EVALUATE

- ☐ Develop metrics to assess the progress and impact of the partnership
- ☐ Regularly review the partnership's effectiveness and make adjustments as needed





# STEP 7: SUSTAIN AND GROW THE RELATIONSHIP

## ESTABLISH CONFLICT RESOLUTION MECHANISMS

- ☐ Include clear procedures for resolving conflicts in the partnership agreement
- ☐ Designate a neutral third party or mediator to facilitate conflict resolution if necessary
- ☐ Address conflicts early by:
  - Encouraging open communication and addressing conflicts as soon as they arise
  - Using a structured approach to identify the root cause of conflicts and developing mutually acceptable solutions

## BUILD TRUST AND MUTUAL RESPECT

- ☐ Foster a culture of trust, transparency, and mutual respect
- ☐ Celebrate successes and recognize contributions from all partners
- ☐ Encourage continuous learning and improvement within the partnership
- ☐ Be open to feedback and willing to adapt to changing circumstances and needs



# STEP 7: SUSTAIN AND GROW THE RELATIONSHIP (CONT'D)



## CO-DESIGN EXPECTATIONS AROUND INTERACTIONS

- ☐ This may include:
- Clearly defined roles
  - Acknowledgement of power dynamics
  - Acknowledgement of leadership and knowledge through stipends
  - Sharing power through delegation of roles and responsibilities in ways that are inconsistent with traditional western norms
  - Create a space for shared accountability between partners





# RESOURCES



## Implicit Bias, Environmental Justice Principles

- [Implicit Bias Blindspot Test](#)
- [White Supremacy Culture](#)
- [The Principles of Environmental Justice](#)
- [White Dominant Culture & Something Different](#)
- [Characteristics of White Supremacy Culture](#)
- [Facilitation for Racial Justice Conversations](#)



## Shared Accountability

- [10 Strategies for Cultivating Community Accountability](#)
- [Accountability Structure Toolkit](#)



## Race/Ethnicity Data Disaggregation Toolkits

- [For CBOs & Advocates](#)
- [For Data Managers, Systems Admins & Analysts](#)
- [Centering Racial Equity through Data Integration](#)



## Organization Evaluations and Gap Analysis

- [9 questions to help you develop an equity mindset](#)
- [Self-evaluation of the organization](#)
- [External evaluation of the organization](#)
- [The Partnerships Analysis Tool](#)
- [4 States in Gap Analysis](#)
- [Stakeholder Analysis Guide](#)

Scan for virtual resources!





# QUESTIONS?

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