



Stewardship Works!

A Unique Model for Core Funding

Report Appendices

The Stewardship Centre for BC

March 2011

Fraser Salmon & Watersheds Program



Fraser Basin Council



Fisheries and Oceans Canada



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Workshop Report

Stewardship Works!

A Core Funding Model

May 23, 2007

Wosk Centre for Dialogue

Vancouver BC

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**Ministry of
Environment**



Fraser Basin Council



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Summary of Outcomes

Thirty-two representatives from funders, federal and provincial governments, and stewardship organizations met for a one-day workshop on May 23, 2007. Their task was to provide input into the draft ***Stewardship Works!*** core funding model proposed by the Stewardship Centre for BC (SCBC) in partnership with the Ministry of Environment.

The following points represent the general opinions of workshop participants:

- The health of community-based stewardship groups is an important issue for achievement of environmental goals, for both communities and for governments' shared stewardship programs.
- Core funding is one of a suite of related activities that affects the organizational health of non-government groups.
- If core funding is considered, it should be part of a broader overall long term strategy to deal with the health of NGOs (lack of core funding is a barrier; put core funding grants in context).
- The challenge of this program is to build capacity within stewardship organizations, without creating reliance on this fund for permanent assistance.
- There was agreement on the range of activities that are supportable by core funding. Generally, these activities are associated with the internal and external aspects of training, retraining, deploying, recruiting and retaining volunteers. (Core funding supports the capacity of groups; keep the accountabilities for core funding separate from the accountabilities for projects.)
- Management of any core funding model requires clear, transparent and equitable governance and administration processes so that as many groups as possible can benefit.
- The Stewardship Centre for BC is well-placed as being the administration manager for this grant.
- Application, reporting and evaluation requirements should be simple and electronic. The effects of core funding expenditures must be easily quantified.
- Evaluation is an important component of a core funding program that needs to be designed into the program from the outset. Evaluating the effects of core funding is different from project evaluation, and as such, needs a different set of measurement criteria, e.g. growth of organizational capacity.

- There was agreement that the core funding model should be beta tested and evaluated, and that there be distribution of funds on a pilot basis. As per the intent of ***Stewardship Works!***, the evaluation framework should be vetted through expert evaluators across the country and in other sectors, such as health, where there is a wealth of evaluative expertise on public projects.

Welcome

I live in Port Alberni, and the local group to which I belong is called Citizens' Stewardship Coalition. All of us volunteer our time and expertise to help make our local area a healthy, sustainable place to live. Because we're volunteers, leadership and membership fluctuate, along with our ability to coordinate our activities, more fully engage the public, acquire materials and expertise and pay for liability and accident insurance for our members working in the field. All these items relate to our groups capacity to carry out much-needed work in our community.

To one degree or another, nearly every stewardship group in the province faces some challenges to building capacity within their organization so it can achieve the results their community needs and desires. A good way to meet challenges is by forming partnerships.

That's why we're here today, to look at this continuing challenge of building capacity among and within stewardship groups throughout the province, and to further explore partnerships.

Stewardship, to me, means taking on the responsibilities of looking after one's home, the communities we all live in. My sincerest wish is that today's workshop will bring us closer to finding sustainable ways to support stewardship activities in all our communities.

Maggie Paquet
Vice-Chair
Stewardship Centre for British Columbia

How We Got Here: A Brief Summary Of Activities And Research

The Healthy Ecosystems Healthy People Project (HEHPP) was initiated by the Ministry of Environment's Stewardship Outreach Project, with Act Now funding, to increase the number of volunteers within the stewardship community.

HEHPP conducted the following research:

- BC-wide phone survey about volunteering
- Literature review of volunteering with stewardship organizations
- Stewardship organizations member survey
- Phone survey with 81 stewardship organizations

The HEHPP research found that stewardship groups want and need more volunteers to carry out their activities, but they lack the capacity to manage and recruit more volunteers. The biggest barrier to building capacity is core funding¹.

The Stewardship Centre for BC was one of many partners invited to participate in the project committee. From work on that committee, the SCBC and HEHPP formed a partnership to develop the initial *Stewardship Works!* program.

Research highlights of a literature review conducted by SCBC included:

“Designated funding for core expenses is obtained by less than a third of the groups surveyed.”

“Project funding should be accompanied or supplemented by core funding that allows for effective implementation of projects and long-term capacity-building.”

Dovetail Consulting Inc.
*Facing the Future of Stewardship
in the Lower Fraser Area, 2002.*

“Recommendation #5: Create stability for watershed stewardship groups and programs by generating long term, stable funding through diverse sources.”

Langley Environmental Partners,
Land Stewardship Centre of Canada.
*National Watershed Stewardship Report: Policy recommendations
and suggested actions to expand and strengthen
watershed stewardship in Canada, 2003*

¹ Core funding means small amounts of financial support for community-based groups to maintain and build capacity. Examples of core funding are: volunteer management, fundraising and development, liaison with partners, and office expenses.

“Lack of administration and overhead funding” – a limiting factor and challenge to stewardship groups.

The Pacific Salmon Foundation.
Pacific Salmon Foundation Survey Compilation of Aquatic Stewardship Community Questionnaire, 2006

“Confidence in this sector and recognition of the tremendous value it provides the citizens of BC needs to be demonstrated by all levels of government through various funding programs such as core funding...”

Angela Smailes. *Funding Solutions, A Funding Survey of 100 Environmental Organizations in B.C.*, 2004

There has been success when funding agencies “help stabilize [organizations’] funding base, which allow[s] them to take on new, “big picture” issues and projects”

Brian Harvey and David Greer. *Reality Stewardship: Survival of the Fittest for Community Salmon Groups*, 2004

Other research studies have also recommended providing core funding to community-based stewardship groups:

- The East Kootenay Conservation Program. *The Columbia-Kootenay Public Opinion Poll*. 2006
- Stewards of the Lower Fraser. *Facing the Future of Community Stewardship in the Lower Fraser, BC*. 2002
- Alberta Ecotrust. *Maximizing Effectiveness: An Assessment of Environmental Priorities and Voluntary Sector Capacity Needs in Alberta*. 2004.

Providing stable core funding was identified as a tangible action that would have a positive impact on the stability of stewardship groups, resulting in groups being better able to effectively and efficiently deliver a variety of projects and programs. This was the genesis of the ***Stewardship Works!*** program.

Three research projects were completed to further inform its development:

- Funding Organizations Overview: a summary of funding organizations, their missions, funding criteria, eligibility, etc.
- Literature Review: review of past research and surveys on stewardship community needs.
- Funder Interviews: various funders were interviewed by Cathy Beaumont regarding their potential support for a core funding program.

Utilizing the knowledge gained from the research, the SCBC/HEHPP partnership developed the ***Stewardship Works!***

community-based stewardship groups. The intended outcomes of the ***Stewardship Works!*** program model are:

- Increase social and organizational capacity (health) of stewardship groups, resulting in an increase in conservation and protection of natural values
- Increase volunteer involvement in stewardship
- Recognize the contribution of local stewardship organizations
- Enable organizations to leverage additional contributions
- Evaluate stewardship effectiveness
- Demonstrate commitment to shared stewardship
- Deliver education and outreach programs

The SCBC/HEHPP partnership has secured the following investments in the ***Stewardship Works!*** Program to date:

Funds received for ***Stewardship Works!*** Program Development:

\$13,700	(Fraser Salmon and Watersheds Program)
\$21,000	(Living Rivers Trust Fund)
<u>\$15,000</u>	(Ministry of Environment)
\$49,700	

Funds received for ***Stewardship Works!*** Grants:

\$25,000	(Fraser Salmon and Watersheds Program)
<u>\$50,000</u>	(Ministry of Environment)
\$75,000	

The SCBC, Healthy Ecosystems Healthy People Program, and other partners have also made significant in-kind investments in the ***Stewardship Works!*** program.

Funder Research Summary and Insights

A number of interviews were conducted with funders and potential funders of stewardship groups in March 2007. The purpose was to find out how funders perceived the idea of core funding, what might encourage them to participate in the *Stewardship Works!* funding model and what might hold them back.

- Overall, funders understood that the lack of core funding affects the ability of groups to do stewardship work.
- There was strong support among funders for the concept of matching grants.
- Funders were in support of core funding for stewardship groups, but accountability was a concern.
- Perceived advantages of core funding included: stability and increased effectiveness; freeing up staff time; attracting volunteers; continuity for long-term projects.
- Perceived disadvantages included: possible misuse of funds, core funding not a magic bullet, return on investment, sustainability issues, could cause conflict.
- How to encourage funders: demonstrate return on investment; be clear about use of funding for advocacy; show government commitment; understand funders' internal constraints; manage expectations; bring all parties to the table to develop the funding program; find a "home" for the program.

Draft Funding Model

This is a brief summary of a draft funding model for the *Stewardship Works!* program that was provided in advance to workshop participants. The funding model is designed to build the organizational strength and capacity of community-based environmental stewardship groups.

The goal of this program will be healthier groups that will be much more successful at delivering a wide range of projects.

It aims to address the basic organizational needs of frontline partners who often provide valuable services to achieve the mandates of governments. It addresses the need for core (operational) funding at the local level—a critical barrier to the effectiveness of community-based stewardship groups. There are many sources of funding for on-the-ground environmental stewardship projects. This funding model is unique in that its goal is to build the capacity of local groups by addressing their basic organizational needs.

1. Background

Stewardship is an ethic and practice to carefully and responsibly manage natural resources and ecosystems for the benefit of current and future generations. Stewardship demonstrates a commitment by governments, communities, corporations, non-profits and individuals to voluntarily act in an environmentally, socially and economically sustainable manner.

In many ways, stewardship groups in British Columbia directly and indirectly provide invaluable services and assistance to all levels of governments.

2. Barriers to Effective Community-Based Stewardship Groups

Extensive research over the past four years that has examined the roles and status of British Columbia's stewardship community. A common theme in this research indicates that the success of stewardship groups in British Columbia is limited by their lack of capacity to attract, train and manage volunteers, coordinate their activities, and plan their projects.

Stewardship groups tend to be funded on a short-term, project-by-project basis, with core funding support sometimes coming in the form of administration expenditures. Pursuing project funds simply for the survival opportunities that flow from administration components of projects can result in stewardship groups experiencing "mission drift".

Stewardship groups are left with little or no resources to do long-term planning, properly recruit and manage volunteers, and carry out other complementary stewardship activities that

raise public awareness and support for conservation work. This lack of capacity is greatly inhibiting the effective delivery of existing stewardship projects and programs.²

Providing stable core funding was identified as a tangible action that would have a positive impact on the stability of stewardship groups, resulting in groups being better able to effectively and efficiently deliver a variety of projects and programs.

3. What is Core Funding?

Core funding is small amounts of ongoing financial support for community-based groups to maintain and build capacity (office, telephone, courier, computer, part-time contractor, production of project fund raising applications, data entry, etc.) associated with managing, training, retraining, deploying and recruiting of volunteers. These volunteers undertake a wide variety of key planning, protection, restoration, enhancement and educational activities that are associated with the stewardship of ecosystems.

4. A Funding Model to Address the Core Funding Barrier

4.1 Design

Stewardship Works! is a challenge grant program for existing local community-based stewardship groups. Groups with regional or province-wide scopes are excluded.

Grants from the ***Stewardship Works!*** Program must be matched on a 1:1 basis with cash, donated materials, volunteer labour, and other contributions. The matching contribution of the local stewardship group will need to be linked to increases in the number and effort of volunteers, the number of project applications, increases in project funds and other measurables.

Two separate but complementary granting streams are proposed for the program:

1. A three-year testing of the funding model using 15 stewardship groups working in a variety of locales, and on a variety of issues; and
2. Grants of \$100 to \$5000 to remaining stewardship groups to assist in addressing immediate capacity issues.

Sustainability issues will be addressed once the funding model has been tested. Ideally, an endowment of \$10-15 million would provide a basic level of revenue to address the need.

² Research carried out by: the Ministry of Environment, Pacific Salmon Foundation, East Kootenay Conservation Program, Stewards of the Lower Fraser, Leading Edge Conference, National Watershed Stewardship Coalition, Pacific Fisheries Resource Conservation Council, and the Finding Solutions Network all have solid research data that document these stewardship group issues.

4.2 Testing the Design of the Funding Model

The core funding initiative will be a three year pilot program. It is being designed to ensure that effective evaluation and monitoring of results will occur, and that the efficacy of the program can be determined at the end of three years.

Fifteen stewardship groups will be chosen to test the funding model after careful screening based on criteria that are under development.

- Groups will be diverse in size, type of work and area of interest.
- Baseline data on the organization and its past and current projects will be collected.
- There will be three levels of annual challenge grants: Five grants each at the \$5K, \$10K and \$15K levels.
- Grants will be for three years, and will be subject to annual review.
- There will be a requirement to submit organizational and project data.

4.3 Immediate Support for Remaining Stewardship Groups

Continued survival of stewardship groups is an ongoing challenge. In order for stewardship organizations to continue building capacity within their organizations, and for them to remain effective, it is imperative to begin providing core funding to those groups who are not part of the pilot program.

It is proposed that challenge grants of \$100-\$5000 be made subject to available funding. Local groups receiving such monies will be required to report organizational and project data, but not at the same detail as the groups in the 3 year funding model testing component.

4.4 Selection of Grant Recipients

A small committee comprised of representatives of the following groups will be responsible for selecting grant recipients: SCBC Directors (both non government and government affiliations), funders and broad stewardship interests.

Funds from funders that have specific requirements, such as support for particular types of: activities, groups, regions, or watersheds, will be matched to groups that meet the funders' requirements.

5. Performance Management Framework

Evaluation is a key component of the three-year testing phase of the ***Stewardship Works!*** challenge grant program. This evaluation will provide assurances to funding contributors that the money they provide is achieving the environmental outcomes they desire.

The Ministry of Environment's Healthy Ecosystems Healthy People ActNow Project is assisting with the development of an evaluation and monitoring program. Rick Kool, a Royal Roads University professor, and his graduate students are assisting with the development of this monitoring and evaluation of stewardship groups.

SCBC will need to retain adequate resources to administer the grants and assist in the analysis of data.

5.1 Database System

A **Stewardship Works!** database module would be added to the existing Stewardship Centre database and would underlay all of the **Stewardship Works!** processes. This would be a secure integrated end-to-end system that would be used for: screening of groups; grant rationale and details; tracking of funds; reporting; outcome reporting; and program evaluation.

Features of the system:

- Stewardship groups would register on the system, creating a profile that would be saved and that they could update at any time. This would make it easier for the groups to reapply for funds, and would also give SCBC valuable information on the groups that do not receive funds.
- Applications could be sorted based on various factors such as region, community, activity, etc. so that funds could be distributed according to the criteria.
- Applications would be reviewed by the program review committee online to increase efficiency and reduce overhead costs associated with managing the review process.
- All stewardship group reporting would occur online, and this information would be rolled up into an annual report.
- The data collected would allow for the assessment of the efficacy of the challenge grant by evaluating whether objectives are being met, and what improvements should be made to the program to help it operate more effectively and efficiently.
- Other funders would be invited to use this software for their application and reporting processes.

5.2 StewardshipWorks.bc.ca

The online home for this program would be the **Stewardship Works!** website, a community of interest website that is hosted by the Stewardship Centre for BC at www.StewardshipWorks.bc.ca.

General Workshop Discussion on the Draft Funding Model

Q1: What is the timeframe for creating an endowment fund?

An endowment fund would be created after a three-year testing period when consensus on the type of core funding has been reached.

Q2: How long would the core-funding application be?

Currently the thinking is to front-end load the funding, and tail it off, or have smaller grants when needed. The answer would also be dependent on reporting criteria to the funding group. Five to 10 years is a number that is being advocated by new models of funding in the US.

Q3: Is there a common vision of the 15 groups in the test?

It would be ideal to get some geographical representation and a mix of activities.

Q4: How will you cap the number of organizations funded in the test?

There will be three levels of funding: \$5K, \$10K or \$15K. Organizations with immediate needs could receive funding ranging from \$100-\$5000.

Q5: Are there other provincial models?

- We are familiar with Ontario Government model of Stewardship Councils, however, the funds are used for coordination of private land issues. BC's needs are more diverse than that, and want to focus on the grassroots-based groups.
- Core funding would allow groups to do what they truly want to do about capacity issues rather than apply for grants for large projects to get a small amount of money to attempt to deal with organizational capacity issues.
- Core funding is often obtained through project administration fees, and many groups receive these.

Q6: For the startup phase, how much say does the contributing funder have in where the funds go?

There would likely be funding pots within the **Stewardship Works!** program that would reflect the needs of individual funders.

Q7: How comfortable are funders with the idea of core funding?

- Boards recognize that there are unavoidable overhead costs, but these costs are addressed with administration costs attached to the project. Funders do expect a detailed application to meet reporting guidelines.
- Seed funding is also another mechanism that can be employed to help develop good project proposals, which is a much shorter application process, and does not require as much time.

- Time taken to fill in funding proposals is not covered by project administration costs.
- Funding needs to be tied to performance, and continued funding would be contingent on that.
- Government recognizes that they need stewards and that the work can't be done by itself. A United Way model could provide opportunity to continue funding. Pilot **Stewardship Works!** projects could be delivered on the basis of drivers and issues, rather than stratification by funding amounts.
- The pilot phase could take into account the issues that are important to governments.
- Funders that are connected to organizations within the community acknowledge administration costs are important, however they are ambivalent about money as the only way of supporting groups. What other things need to happen within the organizations, e.g. leadership, volunteer retention? For funders, these are not necessarily needs that can best be met with money.
- Funders can help with capacity building.
- There is a risk that core funding breeds dependence.
- How would we acknowledge the issue of reach and membership? Governments may be reluctant to fund a group if there is a small reach, or a small membership. Funding should help to build organizational capacity rather than dependence.
- Ottawa's international programming is now determining that 20% of funding for a project is for administration costs rather than going through a financial audit, which becomes cumbersome. This model can also be examined by the environment sector.

Input On The Draft Model

Participants divided into four groups, where they discussed one of four themes: governance and administration, eligibility and application, core activities and reporting and evaluation. Over the course of the session, they were able to discuss all four themes by rotating through four tables. Each group of 5-7 participants had 20 minutes at each table.

The following notes summarize the brainstorming, comments, advice, and discussions at the four tables. These comments will be considered while revising and testing the final model.

Table 1: Governance and Administration

What type of program oversight is required?

- There are three components to managing this program: program administration, fund administration and a technical committee.
- Program administration should utilize an existing host organization with broad geographical representation; grass roots representation, a diverse mix of rural and urban representatives, and incorporates all stewardship sectors.
- The skill set of the host organization(s) should be broad.
- The SCBC was seen to be well-placed to serve as the program administrator.
- There is a potential for real or perceived conflict of interest with organizations who have a representative sit on the SCBC Board of Directors. There must be a policy in place to deal with this.
- Fund administration should be by a credible organization outside of government with a strong history of investment management.
- It may be advisable to determine the role of the fund administrator, and prepare a Request for Proposals. This would enable a very open, transparent process.
- The Vancouver Foundation was suggested as a possible candidate for fund administrator.
- It would be important that revenue generated from fund investments be re-invested in the fund.
- Regional scale of administration was discussed, but felt there would be too much duplicate administration.

Should there be a steering committee, advisory group, or something similar?

- A large technical committee (granting committee) may be necessary to make decisions about fund distribution.
- Funders and stewardship organizations may sit on this committee.
- The committee should have a revolving membership with mentorship.
- There should be separate project/ core funding decision makers.

- Some funders indicated that they would not wish to sit on this committee, as they would already be making decisions about project funds, and this may be a conflict. Instead, they felt an advisory role was more appropriate.
- Creating a dependency is not a desired result. Therefore the following were suggested:
 - Emphasize that long-term funding was not guaranteed.
 - Recipients should rotate.

How can the program attract long term funding commitments from funders?

- Enable year-end contributions to an endowment fund from government organizations.
- Demonstrate that an exit plan is in place, so that we are not creating dependencies on this funding source.
- It is important to stay true to original intent of the program – be cautious of bending the program to meet funder needs.
- Take advantage of current political climate and growing awareness of environmental issues to develop partnerships with new organizations.
- Build community support.
- Part of all funds raised could go to a stewardship endowment that may eventually be self sufficient.
- Look to US/ Canadian foundations to participate in *Stewardship Works!*

What will give the funders confidence that their money is being used/managed responsibly? What is the best way to ensure that the program meets the needs of funders with different priorities or objectives?

- Meeting funder mandate, which may not be organizational health.
- One year grants promote accountability and complete reporting. Multiple year grants tend to promote lack of reporting and may lead to straying from the original intent.
- Three year commitment with an annual reporting and review.
- Audit function must be performed.
- Funders may be able to assist with ideas/support.
- Depreciating contributions.
- Key funders may be able to provide staff to administer or audit or mentor.

What should the granting cycle look like? What is the best time of year to distribute funds?

- Enable funds to be carried forward through the funding year.
- Directed approach to funding may be preferred to eliminate the need for an open call for proposals.
- Be sensitive to the groups' fiscal year ends, instead of government year end.
- Stewards appreciate funding that will bridge them through spring (receipt by April 1). This may require proposals to be submitted in the fall.

- 30% (or more) of the grant should be distributed up front.

Other Discussion

- This fund should emphasize capacity building and organizational health, instead of core funding which may have negative connotations associated with it.
- Key issue: groups' sustainability
- Core funding is one of the components of the solution.
- Need stated objectives: what is the organization's health? Define.
- May choose to direct funds in geographic/ strategic location.
- Vancity model: provide one large award annually; this creates great interest and profile.

Input On The Draft Model:

Table 2: Eligibility and Application

What Should Determine Eligibility?

Information about the group:

- Years established as a group.
- Groups in existence under the designated time threshold e.g. “new” groups could be eligible for small amounts of money Funds awarded to these groups would be capped at a certain amount (\$500?).
- Experience of the people in the group’s leadership and staff.
- The group’s linkages to other groups and processes; group is involved in collaborative projects/processes.
- Vision statement of the organization and its track record (group needs to be able to show it is healthy and has strengths and a plan).
- Detailed organizational assessment, including risk assessment; plan for use of the requested funds; what work does it support; group’s long term plans (25 years).

How funding will be used:

- Term of work undertaken or needed (long, medium or short term).
- Volunteer capacity of the group and whether the funds will be used to build a volunteer base.
- Collaboration is important but it should be a bonus not a requirement.
- Quality of the volunteer opportunities created (e.g. personal opportunity to make a difference (value for time) or the work will move the conservation/stewardship agenda forward.
- Environmental impact: tie to larger or longer term issues.
- Planned work fits with larger strategic plans on a regional/local scale.
- Community-building: the work builds community capacity beyond the group.
- Consider establishing thematic areas for funding: education; strategic planning; habitat and/or species restoration; water conservation.

Matching Funds: What Contributions Are Acceptable?

- Contributions require a weighting factor
 - Time
 - Money
 - Materials
 - Numbers of volunteers
 - Previous phases of a project, if the work is directly linked
 - Whether the project leverages the work of planning processes—this would need to be refined/defined.

What Type of Application is Required?

- Wildlife Habitat Canada can provide details on an online marketplace event approach used in Ontario. Its strength is that the marketplace replaces a lot of administration. A group registers, details the scale and scope of its needs and the foundations then decide on an individual basis which organizations fit their needs.
- Standardized approach like a checklist.
- In the beginning specific goals need to be targeted.
- Checklist vs. Letter of Interest approach: checklist lends itself to the idea of matching funders to seekers; letter of interest seems more related to project proposals.
- Simple and fast—application should take about 15 minutes to complete.
- Online aspect was an important discussion—online idea is OK but it MUST WORK, and the fund must realize that.
- Application needs to be linked with evaluation and investment areas.
- Letters of support are needed to link in with the idea of the uses meeting community needs/community building/regional priorities.
- To help streamline the process: have pre-approved or identified local community endorsers.

Is the Proposed Database the Way to Go?

- Database idea is OK but it must work.
- Database needs an administrator attached to it otherwise it will fail. There needs to be direct and instantaneous communication with the system. People are skeptical based on their experiences with systems to date.
- Idea that you can replace administration with technology is OK to a point. Personal follow-up is necessary.
- Need a system where backup documentation can be added.
- Idea surfaced that the database could act as a resumé for groups.
- Cost of establishing a database system was questioned versus having a networked approach to core or a capacity building funding program that each participating funding organization operated as an adjunct to their existing project funding systems.

Input On The Draft Model:

Table 3: Core Activities

What Are Core Funding Expenditures?

- Staff (contract)
- Office/materials/storage/mailing and shipping
- Telephone
- Computer
- Legal/insurance
- Maintenance
- Travel for core activities/per diems

What are OK Core Funding Activities to Build Capacity?

- Volunteer management: the internal and external aspects of training, retraining, deploying, recruiting and retaining volunteers.
- Data entry-keeping track of volunteer time, finances etc.
- Project application writing-promoting the NGO to funders.
- Reporting/outreach/education/web (about NGO).
- Representation at events, meeting etc.
- Strategic planning: vision, goals, and objectives of the NGO.
- Financial audits.
- Building broad community presence and membership.

What Are Not OK Core Activities?

- Project responsibilities

How Do We Deal With Public Policy Advocacy?

- Apply guidelines from the Canada Revenue Agency for charitable NGOs to all NGOs (a maximum of 10% of resources can be used annually for political activities; public awareness and meeting with elected officials are not considered political activities).
- Concentrate on education and public awareness.
- Define advocacy so that NGOs can keep track of their activities.

What are the Potential Conflicts Between Project and Core Funding? **How do we deal with them?**

- Core funding allows NGOs to develop better projects (be more efficient and effective).
- Hopefully, NGOs become self sustaining with core funding assistance to build capacity.
- Currently, core funding is usually part of project funding (project money for project administration is being used for core funding activities).

- There is an imbalance: there is an abundance of project funding on an annual basis; there is little core funding and that is usually on a short term or restricted basis.
- Because of this imbalance, mission drift can be a problem: project monies may be dragging NGO's away from their mission.
- A risk of the ***Stewardship Works!*** model is that core funding could be used for project expenses at the expense of building capacity.
- The goal is healthy NGOs efficiently delivering projects.
- There are objectives for core funding:
 - Capacity: improve health of NGOs
 - Quality and number of projects: have a broader influence
 - Broadening constituency
 - Accountable to core funder
- There are objectives for project funding:
 - Limited to one area
 - Limited to one topic
 - Specific outcomes
 - Accountable to project funder
- There is some overlap in these objectives and in accountabilities. The challenge is to keep core funding and project accountabilities separate.

How do we Satisfy Funders That Need to be Committed to Certain Activities, Groups, Regions, or Watersheds?

- A United Way type of model was suggested to provide a brokerage service to link funders who wish to provide core funding support with NGOs who require core funding support. This may require several themes or funding envelopes (to be determined with input from funders and NGOs).
- Funders will always have projects.

Input On The Draft Model:

Table 4: Reporting and Evaluation

How can funders be satisfied that the outcomes of core funding meet their objectives or goals?

Clear indicators of growth of organizational capacity e.g. membership, projects, retention

- Could use pre-existing organization assessment tools
 - Do initial assessment, then re-evaluate
- What can you achieve over three years of funding to build capacity?
 - Development
 - Regional coordination or resources
 - Building plans and supporting that plan
- Is core funding helping volunteers stay? Measure health of volunteers.

Build on successes and tie it into promotion

- Have generic qualitative component to evaluate groups where groups evaluate themselves - lessons learned.
- Need to tell the story of the group.
- Use reporting for media or other reports.
- Have media contact as part of evaluation.
- Reporting to media can feed back to success of group.
- Use signage for promotion.
- Get on website.
- Have funders look at projects.

Have themes for funding (United Way model) so funders would be contributing to investment areas

- Have indicators for each theme.
- These thematic indicators would reflect reporting needs of funders with specific environmental mandates.

Mentor and supporting key people:

- Succession planning
- Resources for skill development
- Supporting specific expertise to help groups
- Want to encourage entrepreneurship

What documentation is required of grant recipients?

Outcomes of core funding may be long-term but the nature of monitoring required to measure is short-term

- Increase in capacity has different objectives than project funds, and therefore need to measure success differently.
- Get funders to support broader objectives and not micro-manage the funds.
- Could develop indicators for each of the different activities e.g. volunteer coordination (how many volunteers, how many activities).
- Evaluation framework needs to focus on objectives:
 - Quality of projects
 - Better groups
- Would measure:
 - Engagement–broad based support
 - Growing capacity–leveraging other support and influence

How do we measure results? How do we demonstrate increase in environmental outcomes?

Standardize reporting across all funders to make it less work for groups to report

- Have a score-card approach to evaluation to make it easier.
- Focus on the core information that funders really need to fulfill their requirements.

Ultimate goal of core funding is healthy ecosystems and healthy communities

- Develop indicators to measure healthy ecosystems and healthy communities.
- Have general agreement among all parties involved what these indicators are.
- Developing and measuring ecosystem and community indicators should not be the job of stewardship groups to measure.
- Groups would measure how they are influencing these indicators.
- Maybe it needs to be based on sustainability, not necessarily growth.
- Could have outside agencies do qualitative analysis of the group e.g. community advisors.

Appendix A

Workshop Participants

Al Martin	Living Rivers Trust Fund
Alan Moyes	Ministry of Environment
Andrew MacDonald	BC Hydro
Blair Hammond	Environment Canada
Brian Clark	Ministry of Environment
Brian Springinotic	Habitat Conservation Trust Fund
Carol Cornish	Parksville Streamkeepers
Cathy Beaumont	Facilitator
Celina Owens	Real Estate Foundation of BC
Coral deShield	Fraser Basin Council
Dawn Deydey	Elk Valley Stewardship Centre
Deborah Gibson	BC Conservation Foundation
Edwin Hubert	Ministry of Environment
Eva Cheung Robinson	Vancouver Foundation
Faye Smith	Mid Vancouver Island Habitat Enhancement Society
Greg Mallette	Fisheries and Oceans Canada
Gretchen Harlow	Environment Canada
Jim Shinkewski	Pacific Salmon Foundation
Joan Carne	Byrne Creek Streamkeepers
Katherine Dunster	Land Trust Alliance
Kin Mak	Environment Canada
Lonnie Prouse	Langley Environmental Partners Society
Lynn McIntyre	Wildlife Habitat Canada
Maggie Paquet	Stewardship Centre for BC
Marc Saunders	Pacific Salmon Foundation
Naomi Tabata	Stewardship Centre for BC
Nichole Marples	Langley Environmental Partners
Peter Abrams	Stewardship Centre for BC
Rod Silver	Stewardship Centre for BC
Sylvia von Schuckmann	Ministry of Environment
Tim Pringle	The Real Estate Foundation of BC
Tracy Bond	Baker Creek Enhancement Society
Zo Ann Morten	Pacific Steamkeepers Federation

Appendix B

Workshop Expectations and Evaluations

Expectations from workshop participants:

- Take back ideas to share with group
- Explore other possible solutions; not just money
- Find support for groups
- Find out what other people are thinking
- Continue discussion and get on the same page
- Learn more about the **Stewardship Works!** program
- Bring solutions back to organization
- Find agreement on moving model forwards
- Sustainable shared stewardship
- Improve capacity for partnership.

Worked well in the workshop:

- Like revolving table concept
- Half day
- Next steps fast turn around.
- NGO's from around the province
- Prep materials well organized
- Bringing funders and NGO's together in the same room
- Size and diversity were an asset.
- Respectful of opinions

What to do differently next time:

- Work with different people from different groups
- Step back from core-funding as the main purpose. What do we really need to move on?

Appendix C

Additional Comments on the Funding Model

Nikki Wright, Executive Director, SeaChange Marine Conservation Society (personal communication)

1. If the goal is to increase capacity of stewardship groups (and not work on administration) in order for them to protect and conserve the natural world, then it is crucial that the burden already felt by many not be made heavier by lengthy application and reporting processes. Reputation for past and present track record for accountability and project results should be part of the mix for choosing groups. Simple on-line reporting is a good idea. Perhaps phone interviews could be part of the reporting, with a real live interaction between group and funder. I suggest evaluations be done interpersonally, not written or online, with individuals and in groups.

2. I am unclear from the draft document who has been part of the design making. Group reps from the stewardship sectors should be part of the design and implementation of the pilot. The timing, for example, of this workshop is poor for most groups, as spring and summer tend to be the busiest times of the year, so already there may be a reflection that groups' input is not part of the design. Because most groups are already running at over the top capacity, any time they spend on meetings is unpaid and takes a whole day to attend. If conference calls and written communication on the web and email could be part of the process, more feedback from the sector may be possible.

3. Many groups have all three spheres of influence - local, regional and province-wide. Criteria for funding for different groups' size and range of projects is tricky. Some small groups have a wide range of influence.

4. Money must be allowed for coordination itself. I am not sure the category of "part-time contractor" is what is meant by that role. Long term "funding fatigue" sets in for EDs and staff when most of the funding is now cut by 50-70%, which translates as double the workload for project funding applications for half the amount of results on the ground. Staff members are feeling the crunch and fatigue fallout, but the natural environment is ultimately suffering. Groups need the core funding to go where the most need is within the organization to keep the projects healthy and relevant. Group staff should have ultimate decision making powers on this one.

Owen Williams, Stewardship Liaison, Ontario Ministry of Natural Resources (personal communication)

1. Comments on the Introduction:

Insert statements about the environmental need, state of resources, expected increase in challenges relative to the current capacity to respond.

Alternative wording? The goal of this funding is to temporarily support the core capacity of some organizations to deliver key strategic services, with the intent that for some of these organizations the funding will enable them to sustain this higher level of activity. Assessment of the impact of this funding could lead to a larger initiative that would dramatically improve the implementation and achievement of outcomes that are important to the Governments' environmental mandates.

Your final sentence in the paragraph is OK for audiences that appreciate a soft sell, but if your audience is harder nosed folks – i.e. the government department that you want support this – they should want a clearer, business attitude.

2. Comments on Background:

.....ecosystems” (a.k.a. biodiversity) This is assuming the BC government is embracing the biodiversity effort] for the benefit of current and future generations.

3. Comments on Barriers to Effective Community-Based m Stewardship Groups

Add: Mission drift reduces the image of being well led, reduces the relevance of their achievements to their goals, and damages their credibility with investors and members.

Add: The provincial government has the mandate to be aware of the status of and threats to environmental sustainability. It is in a position to identify priorities for action. This funding provides the Government with the opportunity to positively influence organizations and their associated partners and investors, to address these priorities.

Add a section 2 B How this program will remove the barriers

- ... provide concise descriptions of what will be done, e.g.:
- environmental stewardship organizations (you might want to be more specific, even indicate the potential number of organizations), will be invited to submit proposals in response to the specific criteria for funding;
- applicants will be screened using a defensible process that will be documented for future reference; they will be notified and successful applicants will be notified of the conditions placed on their funding (e.g. contract that clarifies expectations, including reporting and subsequent review);

- the funds and the assessment process will:
 - identify the key constraint faced by each organization
 - provide adequate funding to potentially make a tangible removal of that barrier
- program leaders will stay in touch with each organization during the program to monitor progress and offer some advice
- leaders of the program and the funded organization will assess the value of the funding
- a report will be prepared at the end of this program to identify what worked and what did not and make recommendations for the future.

Add a new section 2 C :Outcomes of this program

There will be immediate impact of the funding:

- removal of capacity barriers for XX number of organizations
- increased output from these organizations in areas that are of importance to the government
- a report that assesses the value of this approach

There will be some longer term impacts:

- this boost will get some organizations to a higher level of capacity and they will be able to sustain it
- the program final report will give the government and the stewardship community advice regarding future policy and program designs

Add to “What is Core Funding?”: It is also seen, in most cases, to be seed funding for a limited time, that will enable organizations to raise their achievement and profile to the point that investment from the community makes them sustainable.

4. Comments on the Funding Model: Design, Testing Etc

Have you or the government department, already analyzed and discounted the benefits of a delivery via a coalition of regional/provincial organizations? It seems to me that this could more efficiently be done by increasing the core capacity of these higher level organizations to influence their member and affiliated organizations at the local level.

“Grants from the **Stewardship Works!** program must be matched on at least a 1:1 basis with cash, donated materials, volunteer labour, and other contributions”. [Note – you will need a table of standard values for these contributions.]

“Sustainability issues will be addressed once the funding model has been tested. Ideally, an endowment of \$10-15 million would provide a basic level of revenue to address the need.” The **Stewardship Works!** Board will also seek to lever the government investment by seeking matching donations?

“There will be 3 levels of annual challenge grants: Five grants each at the \$5K, \$10K and \$15K level”. NOTE: these are such small amounts, I wonder if you will be able to prove the impact of the investment.

“Continued survival of stewardship groups is an ongoing challenge. In order for stewardship organizations to continue building capacity within their organizations, and for them to remain effective, it is *imperative* to begin providing core funding to those groups who are not part of the pilot program.” [...so what is the purpose of this pilot program, if not to prove the value of the investment? Why is it imperative to start funding other organizations before proving the value of the investment?]

5. Comments on Performance Management Framework

NOTE: the online system is possible. We are currently building such a system for Ontario. It has been a full year in development and we expect to have organizations entering data this fall.

Appendix 2: Stewardship Works! Proposal Ranking Sheet for Pilot Groups

This review sheet is for Advisory Committee use in rating the applications for the Stewardship Works! pilot project. The sections follow the application form filled out by the groups. The ranking form asks for both numerical ranking and selected comments per section. Total rank out of 20. To be filled out and discussed at the upcoming Advisory Committee meeting.

I. Sort the applications by region

1. Upper Fraser
2. Cariboo/ Chilcotin
3. Thompson
4. Fraser Valley
5. Greater Vancouver/Sea-to-Sky
6. North, North Coast/Haida Gwaii
7. Kootenays/Boundary
8. Vancouver Island/Sunshine Coast
9. Okanagan

II. Section B. Funding Criteria (seven in total)

Please note any categories that are **NOT** checked off and subtract ½ a point (-0.5 point) from the overall score for each one. An application without all boxes checked will be eliminated from the selection process.

III. Section D. Type of Stewardship Activities

Summarize and note the kinds of activities conducted by the group below:

E.g. Landowner /covenants ; Salmon/ habitat.

For the Fraser Basin Region Groups - they must be working on salmon and their habitat to receive funding:

IF the proposal is from the Fraser Basin Region (*regions 1-5*), check **Section D.** to see that they have included the Activity 4th from the bottom: ***Conduct activities for the benefit of salmon and their habitat.***

IV. Section E: First Nations Linkages

Please check off one:

No relationship: _____

Some / strong relationship: _____ (add 1 point to score) /1

Note: For the **Fraser Basin Region**, it would be good to have one of the chosen groups working with First Nations.

V. Section F. Eligible Core Funding Expenditures

Amount requested by group: _____

Ensure that all the activities described are *not* directly related to projects, and fall under the defined core funding categories below. Check them off as follows:

- ☐ Volunteer management, training, deploying and recruitment
- ☐ Office expenses (e.g. telephone, heat, courier, computer upgrades)
- ☐ Volunteer coordinator fees
- ☐ Part time contractors
- ☐ Production of project fund-raising applications, grant writing
- ☐ Training, Travel
- ☐ Professional fees, insurance
- ☐ Other: describe briefly:_____

Activities are all eligible core funding expenditures: YES NO

If NO, application is disqualified. Some may require clarification from proponent.

VI. G. Matching Contributions

The application has provided a clear description of matching core funding contributions and sources. (give a mark out of 3)

/3

VII. H. Volunteer Recruitment

This section is the most important one in the application, and is scored out of ten, or 50% of the total ranking.

Does the application describe the *projected impacts* of the proposed core funding on their organization? /2

Does the application describe *a clear rationale (and demonstrated need)* for core funding to enhance volunteer recruitment? /2

Does the organization have a *clear plan* for increasing their numbers of volunteers? /2

Is the plan and projected goal (estimated # of volunteers after 2 years) *realistic and attainable*? /2

Have they provided a strong vision and goals over the long term? /2

Total mark out of 10: /10

Comments:

VIII. Section J. Organization Profile

Are the vision, mission, and goals clearly defined? /2

Is the organization's profile comprehensive? /2

Do the activities address the groups' overall goal or priority? /2

Final Score out of 20: /20

As a reviewer, would you recommend this group be funded?

A, no concerns

B, some concerns

C, not technically sound

What is your overall sense of the application: is it clear and concise? Is the proposed plan for using the core funding understandable, and realistic?

Please explain your rating and provide any comments

Appendix 3:
***Stewardship Works!* Advisory Committee Members**
and Terms of Reference

2008

Name	Organization	Email
Gretchen Harlow	Environment Canada	gretchen.harlow@ec.gc.ca
Liz Stanlake		Liz@stanlake.com
Zo Ann Morten	Pacific Streamkeepers Federation	ZoAnn@PSkF.ca
Edwin Hubert	Ministry of Environment, BC	edwin.hubert@gov.bc.ca
Naomi Tabata	Stewardship Centre for BC	Naomi@StewardshipCentre.bc.ca
Joanne Day	Department of Fisheries and Oceans Canada	Joanne.Day@dfo-mpo.gc.ca
Jeff Jung (information only)	Department of Fisheries and Oceans Canada	JungJ@pac.dfo-mpo.gc.ca
Sue Hemphill	Scout Island Nature Centre	shemphill@wlake.com
Tascha Stubbs	Fraser Salmon and Watersheds Program	tstubbs@psf.ca
Sylvia von Schuckmann,	Ministry of Environment, BC	Sylvia.vonSchuckmann@gov.bc.ca
Sheila Creighton/ Lindsay Gardner	Fraser Basin Council	lgardner@fraserbasin.bc.ca sheilacreighton@telus.net
Sue Staniforth	Staniforth & Associates	sstan@shaw.ca

Some Background

The *Stewardship Works!* initiative is a three-year pilot project whose main goal is to build the capacity of volunteer groups by addressing their basic organizational needs. The initiative will explore and support the core funding needs of up to nine stewardship groups. This **Advisory Committee (AC)** will be an ad hoc one, working primarily through email and conference calls as needed. Sue Staniforth, along with staff of the Stewardship Centre and the Ministry of Environment, will provide administrative and logistical support.

AC Terms of Reference

Dear Friend of the Stewardship Centre for BC:

The Stewardship Centre for BC (SCBC) and several partners are testing a new funding program to support the operational and core components of stewardship organizations around the province. The *Stewardship Works!* initiative is a three-year pilot project whose main goal is to build the capacity of volunteer groups by addressing their basic

organizational needs. The initiative will explore and support the core funding needs of up to nine stewardship groups. Part of this work involves setting up an Advisory Committee to help guide the process. We are writing today to ask if you would consider being a part of this group.

We are looking at approximately 8 members of the Advisory Committee (AC) in total. The time commitment will be minimal, and the committee will be an ad hoc one, working primarily through email and conference calls as needed.

The Advisory Committee's main tasks will be:

- to assist in the development of criteria for selecting the pilot stewardship groups,
- choosing the stewardship groups to pilot the project,
- helping define what constitutes a strong community group.
- reviewing evaluation tools such as interview guides, survey questions, draft lists of qualitative and quantitative indicators of success,
- reviewing draft templates for stewardship groups reporting to ensure they are not overly onerous yet capture key information,
- advising on the development and progress of the funding model and the overall initiative.

The work of defining criteria and choosing stewardship groups would begin in January 2008. We will meet on a monthly basis for the first three or four months by conference call, with document reviews done primarily via email. Once the groups are selected and the pilot project is up and running, meetings will be on an as-needed basis, and are predicted to be only 3 - 4 times a year.

Conflict of Interest:

When selecting groups to receive funds, there is a potential for conflict of interest for members of the AC. There is a need to be very transparent and clear in how recipient groups are selected, and funds designated. A common process for committee members is: whereby any perceived conflict or association with a proposed stewardship group where the member stands to reap personal gain must be declared up front to the Committee, and that member should withdraw from the voting process when said group is being discussed. Clear criteria for selecting the pilot groups will also be an important component of ensuring fairness and due process.

Sue Staniforth, a biologist, educator and evaluation consultant based in North Saanich, BC has been hired on contract to develop an evaluation framework for this initiative and to help in assessing its impacts over the pilot phase. Sue, along with staff of the Stewardship Centre and the Ministry of Environment, will provide administrative and logistical support, including chairing meetings and circulating agendas and minutes in a timely fashion.

Your expertise in local stewardship initiatives and your commitment to this work in BC will be an invaluable addition to our team. We hope you will agree to assist in this important and ground-breaking initiative. Many thanks for your time and consideration, and we look forward to hearing from you soon.

Sue Staniforth and Naomi Tabata

Please note: All applicants should review the important information on the application information document that accompanies this form. Provide all responses within the grey boxes. This application should be no more than 4 pages upon completion. Please submit completed application by email to ntabata@telus.net by midnight, March 6, 2008. Late or incomplete applications will not be considered.

Date of Application:

A. Applicant Information

Organization Name:

B. Funding Criteria Information

Please indicate if the following statements apply to your organization:

- ☐ Our organization has defined our vision, mission and goals
- ☐ Our organization can provide baseline data on core funding for the past three years
- ☐ Our organization has a strong history of completing projects and activities
- ☐ Our organization plans to undertake projects or activities for at least 3 more years
- ☐ Our organization has a demonstrated need for core funding to enhance our organizational capacity
- ☐ We are a registered society, or we have an established and accountable governance structure
- ☐ We are able to demonstrate matching funds for core expenditures

C. Main Location of Activities

- | | |
|---|--|
| <input type="checkbox"/> Upper Fraser | <input type="checkbox"/> North (including North Coast) |
| <input type="checkbox"/> Cariboo/Chilcotin | <input type="checkbox"/> Kootenays/Boundary |
| <input type="checkbox"/> Thompson | <input type="checkbox"/> Vancouver Island/Sunshine Coast |
| <input type="checkbox"/> Fraser Valley | <input type="checkbox"/> Okanagan |
| <input type="checkbox"/> Greater Vancouver/Sea-to-Sky | |

D. Type of Stewardship Activities

Please indicate the top three activities of your stewardship organization:

- ☐ Promote stewardship through landowner contact programs
- ☐ Offer educational programs linking people to nature
- ☐ Purchase, receive or monitor conservation covenants
- ☐ Undertake habitat protection, restoration, and/or enhancement activities
- ☐ Provide monitoring or caretaking activities for nature
- ☐ Undertake ecological research
- ☐ Conduct activities for the benefit of salmon and their habitat
- ☐ Provide legal, scientific, or other specialized services
- ☐ Act as an advocate for policy and/or behavioural change
- ☐ Other:

E. First Nations Linkages

Although a linkage with a First Nations organization is not mandatory, we are interested in knowing if grant recipients work with local First Nations organizations. Please check the sentence that best describes your relationship.

- ☐ We do not have any significant relationship with First Nations organizations
☐ We have several First Nations members, volunteers, and/or participants
☐ We partner with local First Nations organizations on one or more projects

Briefly explain:

F. Eligible Core Funding Expenditures

The *Stewardship Works!* program will provide \$2,500 to \$5,000 in core operating grants for non-project expenses. A list of eligible core funding expenses is provided in the application information document. Please provide a description of how these funds will be spent on eligible core funding expenses.

G. Matching Contributions

It is necessary for successful applicants to demonstrate that an equal amount of core funding is being received from other sources. Please indicate total core funding received (including project administration fees and in-kind contributions) in the past year, or an average of the past three years.

Core funding has been received from (list sources):

Annual Matching Cash Contributions used for Core Funding \$
Annual Matching In-Kind Contributions Used for Core Funding* \$

* materials and time (based on \$20 per hour)

H. Volunteer Recruitment

One of the objectives of the *Stewardship Works!* program is to increase volunteer recruitment within stewardship organizations. Please estimate the projected impacts of this core funding on your organization's ability to recruit, train, and retain volunteers. If your application is successful, your success will be evaluated against these criteria.

Current number of volunteers:

Current volunteer hours:

Estimated number of volunteers after 2 years of core funding:

Estimated volunteer hours after 2 years of core funding:

Please provide a brief description of how these funds will result in an increase in the number of volunteers participating in your activities. This should be very brief.

I. Contact Person Information

Please provide your contact information so that we may contact you if we have questions about your proposed project.

Name:

Organization:
Address:
Email:
Phone:

J. Organization Profile

State briefly the vision, mission and goals of your organization.

Please provide a brief profile of your organization.

If the following apply to your organization, please fill in the appropriate information.

Society Number:	Date of Incorporation:
Charity Number:	Number of Members:

K. Terms and Conditions

The *Stewardship Works!* program is a pilot project. There is a need to do extensive evaluation on the results of this project, in order to assess the effectiveness of these grants and to continue the program in the long term. In light of this, there will be additional reporting requirements for the term of this grant period, as described in the cover letter.

If selected as a grant recipient:

- ☐ I understand the additional reporting requirements inherent in participating in this pilot project.
- ☐ I am willing to undertake these additional reporting requirements in a timely fashion
- ☐ I consent to my organization featured as a pilot project grant recipient
- ☐ I am willing to participate in Stewardship Works! program development and capacity building workshops

L. Certification

I certify that the information provided in this application, including all attachments, is accurate to the best of my knowledge and that I am authorized to sign on behalf of this organization.

NOTE: Because this application is submitted by email, a signature does not need to be inserted at the time of application. Instead the application should be submitted (or forwarded) via email from an authorized signatory. Successful grant recipients will be asked to sign the application form and return by mail.

Name:
Date:

Signature

Questions

If you have any questions please contact:
Naomi Tabata, Coordinator
Stewardship Centre for British Columbia
250-286-4765 or 1.866.456.7222
ntabata@telus.net

For Office Use Only:

Date Received:



Stewardship Centre for BC *Stewardship Works!* 2008 Application Information

Dear Stewardship Group:

This letter describes a new pilot initiative called *Stewardship Works!* - a three-year pilot project whose main goal is to build the capacity of volunteer groups by addressing their basic organizational needs. The project will provide small amounts of core funding to nine stewardship groups around the province for a period of 2 years.

The initiative grew out of surveys and interviews spanning the past ten years, which found that acquiring core funding was the number one barrier that community-based stewardship groups currently experience. It is designed to give community-based environmental stewardship groups "a hand up instead of a handout". An **Advisory Committee**, along with staff of the Stewardship Centre and the Ministry of Environment are providing administrative and logistical support to the pilot project. A second more fully resourced phase over longer time frames is planned to follow the pilot project.

Project goals and objectives

Stewardship Works! aims to address the basic organizational needs of frontline non-profit groups who provide valuable services to achieve their conservation and stewardship mandates. It addresses the need for core (operational) funding at the local level - a critical barrier to the effectiveness of community-based stewardship groups. There are many sources of funding for on-the-ground environmental stewardship projects. This funding model is unique in that its goal is to build volunteer capacity of local groups by addressing their basic organizational needs. The goal of this funding will be healthier groups that will be much more successful at delivering a wide range of projects.

What constitutes "core funding"?

Core funding is small amounts of ongoing financial support for community-based groups to maintain and build capacity associated with managing, training, retraining, deploying and recruiting volunteers. Generally, core funding supports the capacity of groups and is not directly related to projects. Examples of activities covered by this definition include: office expenses such as telephone, heat, courier, computer upgrades, etc.; volunteer coordinator fees; part-time contractor; production of project fund-raising applications, training; travel; professional fees; insurance; etc.

Project Funds and Requirements

This funding program requires a two year commitment. An annual grant of \$2,500 or \$5,000 will be provided in each of the two years. Funding will be made available to one organization in each of the following regions:

- Upper Fraser
- Cariboo-Chilcotin
- Thompson
- Fraser Valley
- Greater Vancouver-Squamish-Pemberton
- North-North Coast
- Kootenays-Boundary
- Vancouver Island-Sunshine Coast
- Okanagan

The funds will be allocated to the selected groups by March 31, 2008.

Since this initiative is a pilot project, there will be reporting and participation elements that selected groups will have to agree to, in order to enable documentation and evaluation of the process and funding impacts. These will include:

- participation in a one to two day capacity building workshop with all participating groups,
- two or more phone interviews and/or focus groups with an external evaluator to discuss project evolution,
- tracking and documentation of where and how the core funding is spent,
- informal communication with the advisory committee and project team on progress,
- a brief progress report after one year, and
- a final report after two years.

Enclosed please find an application for the *Stewardship Works!* pilot project. If you are interested and willing to participate in the reporting and workshops associated with the pilot, please complete the attached application form and submit it BY EMAIL to:

Naomi Tabata
Stewardship Centre for British Columbia
ntabata@telus.net

If you have any questions or need further information, please call Naomi at the email address above or at one of the following numbers:

tel 250.286.4765

toll-free 1-866-456-7222

The deadline for receiving applications is **midnight Thursday March 6, 2008.**

Many thanks and best of luck with your work!

Stewardship Works! Project

Participating Stewardship Group Reporting Questions

Sue Staniforth

June 15, 2008

Initial Phone Survey:

Questions around Baseline Capacity Data and Priority Uses for the Funding

Introduction

Dear Stewardship Group:

As you know, you are one of ten participants in the two-year *Stewardship Works!* pilot project, whose goal is to supply a small amount of core funding to enable stewardship groups across BC to both sustain themselves and improve their performance. This funding is not intended for “on the ground” environmental stewardship projects, but rather to cover those operating and administrative expenses that grants usually won’t pay for. One of the requirements of this project is to document and track how the core funding supplied to the groups is used and how it impacts their overall performance. This unique funding model is one of the first of its kind in Canada, and in order to assess its viability and success, it needs to be monitored and evaluated. As stated in the proposal, we do not want the reporting conditions to create a workload that outweighs the value of the funds, but we do need to collect sufficient information to assess the success of this venture, and fulfil obligations to our funders. Hence this questionnaire / phone interview.

We are sending this list of questions to you by email in advance of a telephone survey at your convenience in the next few weeks, when the program evaluator, Sue Staniforth, will discuss these questions with you and capture the necessary data. We felt this strategy would save you the time and effort of filling out a written report or survey at this busy time of year.

The questions have to do with your baseline data – where you are now with respect to volunteer and project capacity, and your main priorities for spending this core funding. Sending the questions in advance will hopefully allow you some time to reflect on the responses and also gather the quantitative data we might need.

Many thanks for your help in ensuring that this project is a success and best of luck with your important work!

Sue Staniforth, Naomi Tabata and the Stewardship Works! Advisory Committee

Telephone Interview Questions

June 2008

Basic Contact Data:

Name of Group
Address
Contact person(s)
Email
Phone
website

Present Capacity:

**** Note: We will take this information off a recent data base and review it with you by phone to ensure that it is current**

of staff (full time)
of part time staff
Is anyone a paid staff member?
Do you have a Volunteer coordinator? Yes No
If yes, are they volunteer or paid?
What are the main jobs that need doing in your organization?

Volunteers:

We'd like to get an idea of the number of volunteers your organization has:
We also recognize that there are different categories of volunteers – and so would like to talk about the range and type of volunteers you get and what you require: (estimates are OK!)
I.e. Skill levels
Time commitment
Type of Work

Casual Volunteers (very short-term, one time volunteers)

General task volunteers - casual (i.e. seasonal, tied to a specific project or contract – i.e. Tree Planters / Weed Warriors, salmon spawning)

Highly trained / specialized volunteers - i.e. biologists:

Long term volunteers – all year round

Volunteers that need special training / how does this occur?

Directors: and the ways in which you solicit them

Main tasks carried out by volunteers:

Also – what are your goals for your volunteers?

What is the biggest barrier for you in attracting / retaining volunteers?

What is the biggest barrier for you in completing your group's mandate?

Timeline:

What is your typical work cycle during a year.

What is the busiest time of the year?

Specific activities being carried out then?

Grant writing:

When does it occur?

Who does it?

Success rate in 2007 – 2008?

SW! Core Funding Money:

You received the money in April 2008: (confirm)

Probe: Was the timing good? If not, when would be best to receive it and why?

What is your main priority for spending this money?

Probes: if necessary – i.e. is it to hire a volunteer coordinator? pay for insurance costs? develop or improve website? Build a business plan? Pay utility costs?

Can you provide details as to amounts you'll spend on what specifics?

i.e. \$\$ on phone bills, \$\$ on computer, \$\$ on volunteer coordinator salary.

When will you spend it (is it already gone?!)

Fraser Basin Region Groups: The funds received must be targeted to working with salmon and watersheds: - please describe how you are using the money in this way:

Stewardship Works! Application Process:

What did you think of the overall application process?

Would you have preferred an open call for proposals rather than the nomination process?

How did you find the application form?

(Probe – easy to understand? fill out? time-consuming?)

Workshop:

Part of the Stewardship Works program includes a capacity building workshop to be held sometime in the **Fall 2008**

When would be a good time for you to attend a 1-2 day capacity-building workshop?

What would you like to have happen at the workshop? Needs?

Where should the workshop be held?

Would you prefer to have it “piggy-backed” onto an on-going stewardship group workshop?

Next Steps:

What are your next steps for the rest of this year with your group?

Thinking more longer term, what will your priority be next April when you receive the funds?

Many thanks!!

Stewardship Works! Project

Participating Stewardship Group Reporting Questions

Sue Staniforth

June 15, 2008

Initial Phone Survey:

Questions around Baseline Capacity Data and Priority Uses for the Funding

Introduction

Dear Stewardship Group:

As you know, you are one of ten participants in the two-year *Stewardship Works!* pilot project, whose goal is to supply a small amount of core funding to enable stewardship groups across BC to both sustain themselves and improve their performance. This funding is not intended for “on the ground” environmental stewardship projects, but rather to cover those operating and administrative expenses that grants usually won’t pay for. One of the requirements of this project is to document and track how the core funding supplied to the groups is used and how it impacts their overall performance. This unique funding model is one of the first of its kind in Canada, and in order to assess its viability and success, it needs to be monitored and evaluated. As stated in the proposal, we do not want the reporting conditions to create a workload that outweighs the value of the funds, but we do need to collect sufficient information to assess the success of this venture, and fulfil obligations to our funders. Hence this questionnaire / phone interview.

We are sending this list of questions to you by email in advance of a telephone survey at your convenience in the next few weeks, when the program evaluator, Sue Staniforth, will discuss these questions with you and capture the necessary data. We felt this strategy would save you the time and effort of filling out a written report or survey at this busy time of year.

The questions have to do with your baseline data – where you are now with respect to volunteer and project capacity, and your main priorities for spending this core funding. Sending the questions in advance will hopefully allow you some time to reflect on the responses and also gather the quantitative data we might need.

Many thanks for your help in ensuring that this project is a success and best of luck with your important work!

Sue Staniforth, Naomi Tabata and the Stewardship Works! Advisory Committee

Telephone Interview Questions

June 2008

Basic Contact Data:

Name of Group
Address
Contact person(s)
Email
Phone
website

Present Capacity:

**** Note: We will take this information off a recent data base and review it with you by phone to ensure that it is current**

of staff (full time)
of part time staff
Is anyone a paid staff member?
Do you have a Volunteer coordinator? Yes No
If yes, are they volunteer or paid?
What are the main jobs that need doing in your organization?

Volunteers:

We'd like to get an idea of the number of volunteers your organization has:
We also recognize that there are different categories of volunteers – and so would like to talk about the range and type of volunteers you get and what you require: (estimates are OK!)
I.e. Skill levels
Time commitment
Type of Work

Casual Volunteers (very short-term, one time volunteers)

General task volunteers - casual (i.e. seasonal, tied to a specific project or contract – i.e. Tree Planters / Weed Warriors, salmon spawning)

Highly trained / specialized volunteers - i.e. biologists:

Long term volunteers – all year round

Volunteers that need special training / how does this occur?

Directors: and the ways in which you solicit them

Main tasks carried out by volunteers:

Also – what are your goals for your volunteers?

What is the biggest barrier for you in attracting / retaining volunteers?

What is the biggest barrier for you in completing your group's mandate?

Timeline:

What is your typical work cycle during a year.

What is the busiest time of the year?

Specific activities being carried out then?

Grant writing:

When does it occur?

Who does it?

Success rate in 2007 – 2008?

SW! Core Funding Money:

You received the money in April 2008: (confirm)

Probe: Was the timing good? If not, when would be best to receive it and why?

What is your main priority for spending this money?

Probes: if necessary – i.e. is it to hire a volunteer coordinator? pay for insurance costs? develop or improve website? Build a business plan? Pay utility costs?

Can you provide details as to amounts you'll spend on what specifics?

i.e. \$\$ on phone bills, \$\$ on computer, \$\$ on volunteer coordinator salary.

When will you spend it (is it already gone?!)

Fraser Basin Region Groups: The funds received must be targeted to working with salmon and watersheds: - please describe how you are using the money in this way:

Stewardship Works! Application Process:

What did you think of the overall application process?

Would you have preferred an open call for proposals rather than the nomination process?

How did you find the application form?

(Probe – easy to understand? fill out? time-consuming?)

Workshop:

Part of the Stewardship Works program includes a capacity building workshop to be held sometime in the **Fall 2008**

When would be a good time for you to attend a 1-2 day capacity-building workshop?

What would you like to have happen at the workshop? Needs?

Where should the workshop be held?

Would you prefer to have it “piggy-backed” onto an on-going stewardship group workshop?

Next Steps:

What are your next steps for the rest of this year with your group?

Thinking more longer term, what will your priority be next April when you receive the funds?

Many thanks!!

As one of ten participants in the two-year *Stewardship Works!* (SW!) pilot project, one of your obligations is to provide the Stewardship Centre with an interim report, tracking progress and events to date. As you know, the SW! funding is not intended for “on the ground” environmental stewardship projects, but rather to cover those operating and administrative expenses that grants usually won’t pay for. This unique funding model is one of the first of its kind in Canada, and in order to assess its viability and success, it needs to be monitored and evaluated. We do not want the reporting conditions to create a workload that outweighs the value of the funds, but we do need to collect sufficient information to assess the success of this venture, and fulfil obligations to our funders. Therefore, we have developed a template for you to fill in that meets our requirements for the interim report. If you have any questions or need further information, please contact Naomi Tabata (ntabata@telus.net) or Sue Staniforth (sstan@shaw.ca).

Many thanks for your help in ensuring that this project is a success and best of luck with your important work!

Please use **point form** in answering the following questions. Fill in the grey areas only.

A. Organization Information

Organization Name:
Contact Person:
Address:
Email:
Phone:
Website:

B. Grant Amount

April 2008	\$5,000
January 2009	\$5,000
Total Grant	<u>\$10,000</u>

C. Volunteers

1. Please outline the main ways that the SW! core funding impacted your ability to **attract** and **retain** volunteers, whether they be casual volunteers, long term volunteers or Directors.

•

2. Have you seen any increase in the numbers of volunteers so far? Please describe.

•

D. Volunteer Training

3. Did any of the funds go to supporting volunteer training? If yes, please describe:

•

E. Grant Writing

4. Has receiving the SW! funds impacted your ability to apply for / attract / win grant funding? If so, please discuss how.

•

F. SW! Matching Dollars

5. As you know, grants from the **Stewardship Works!** Program must be matched on a 1:1 basis with cash, donated materials, volunteer labour, and other contributions.

•

Were you successful in getting the matching funds?

•

Did you have to take them out of project-based funding?

•

G. Measuring the Value of the SW! Project

6. Has the SW! project been valuable to your organization?

•

7. What has this core funding enabled you to do differently?

Please tell us how: discuss the main benefits of receiving this type of core funding in both

i.) quantitative (how much and the ways in which the dollars were spent, number of volunteers recruited, number of bills paid, meetings attended, etc) ways:

•

ii.) And qualitative ways (sense of security knowing there was core funds available, the long term nature (2 years of funds) enabling better planning, etc).

•

H. Measurement Indicators

8. We are working to identify specific indicators that will track the impacts on stewardship groups of receiving core funding. The telephone interviews you completed this past summer helped us determine some specifics. Below is a draft list of indicators of impact and progress: please check off all that the SW! funds were used for by your organization this past year.

- ☐ Insurance Costs paid
- ☐ Website development enabled
- ☐ Phone / Utility Costs paid
- ☐ Rental Costs paid
- ☐ Travel Costs covered to meetings and regional gatherings, enabling more representation of our group
- ☐ Conference fees / travel covered
- ☐ Volunteer training
- ☐ More grant applications written
- ☐ Volunteer Coordinator paid
- ☐ Directors better informed, supported
- ☐ Increased volunteer numbers

- ☐ Volunteers supported through special events, food, equipment.
- ☐ Community profile increased through more attendance at events
- ☐ Community profile increased through more press contacts, media articles, press releases.
- ☐ More community projects supported
- ☐ Time to do some forward planning / strategic planning
- ☐ More community partnerships encouraged and supported

9. Please add any other indicators of success that we may have missed, even if they don't pertain directly to your organization or to how you used the funds.

•

1. What About Next Year? (SW! Funds to be received Spring 2009)

10. Will you apply any of the SW! funds to any of these indicators next year??

Please check off the ones that are relevant to you (don't worry, we won't hold you to spending the money on them: this is just a chance to show some forward planning!)

•

11. Anything else you'd like to add? Any questions or concerns?

•

Many thanks!!

Stewardship Works! Project
FINAL Report 2010: A Summary of the Three-Year Pilot Project

Reporting Template

September 27, 2010

Dear Stewardship Group:

Greetings and Happy Fall! We hope your work is going well and we wish you all the best for this coming season. As you know, the ***Stewardship Works!*** pilot project is coming to a close, after an extension enabled us to offer an extra year of funding, bringing the pilot to three years of core funding to ten stewardship groups across BC.

The Stewardship Centre is in the process of planning a wrap-up celebratory and information-based workshop for later this fall (November 2010), which will be targeted at key funders. We hope through your experiences and stories to bring the importance of core funding for stewardship groups to this audience, and set the stage for future initiatives to support long term access to this support.

One of your obligations is to provide the Stewardship Centre with a final report at the end of this pilot project. We are conscious of your busy fall work schedules and so to avoid creating arduous reporting conditions, have developed a reporting template for you to fill out.

If you can get this back to us by **October 15, 2010**, your stewardship group and success stories will be highlighted at the November funders meeting – a great opportunity to profile your organization to a group of potential funders! Otherwise, the deadline for your final report is **Wednesday December 1, 2010**.

We request **three things** from you, as follows:

1. Please complete the Final Report template. We have created tables of the indicators to make completion easier, but please give us your comments and suggestions as well.
2. We need one or more “stories” from you, in simple narrative form, about the work you are doing and the specific ways in which the SW! funds have assisted your work. These can be just one or two paragraphs in length.
3. Please send us 2-3 photos that illustrate the work you are doing. Where possible, please provide a photo caption and credit. By sending us your photos, you agree to allow the

I. Final Report Stewardship Works! Project 2008 - 2010

A. Organization Information

Organization Name:
Contact Person:
Address:
Email:
Phone:
Website:

B. Total Grant Amounts Received:

April 2008	\$
January 2009	\$
Spring 2010	\$
Total Grant	\$

Please indicate how this year's grant was spent, in broad categories (eg: grant writing, volunteer coordination, administration fees, etc). If it is not yet spent, please indicate how it is planned to be expended.

Description	Amount	Spent	Planned
	\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>
Total Grant	\$		

C. Volunteers:

1. Please outline the main ways that the SW! core funding impacted your ability to **attract** and **retain** volunteers, whether they be casual volunteers, long term volunteers or Directors.

•

2. Overall, over the past thee years, did you see any change in the numbers of volunteers? Please elaborate.

•

3. Please indicate the current number of volunteers in your organization this year.

Current number of volunteers:

Current volunteer hours per year:

D. Volunteer training:

4. Did any of the funds during the past three years go to supporting volunteer training?
If yes, please describe:

•

E. Grant writing:

5. Did receiving the SW! funds impact your ability to apply for / attract / win grant funding? If so, please discuss how.

•

F. SW! Matching Dollars:

As you know, grants from the *Stewardship Works!* Program must be matched on a 1:1 basis with cash, donated materials, volunteer labour, and other contributions.

6. Were you successful in getting the matching funds?

•

7. Did you have to take them out of project-based funding?

•

G. Measuring the Value of the SW! Project

8. Ways the SW! project has been valuable to your organization: Some of the **short term impacts** of receiving the core funding grants are listed below. Please check off any that apply to your organization and comment below:

	Short Term Impacts	Comments
<input type="checkbox"/>	Removal of capacity barriers for the stewardship organizations	
<input type="checkbox"/>	Increased output from the organization, including more efficient sourcing and completion of grant and project tasks, work on groups' mission and vision, planning	
<input type="checkbox"/>	More security for a group, as basic costs such as rent, insurance, phone bills, etc. are covered.	
<input type="checkbox"/>	Better volunteer management capabilities, as expressed by happier, more productive volunteers	
<input type="checkbox"/>	Core funding supports staff, enables more community presence	
<input type="checkbox"/>	Provides hope for the groups' longevity which increases participation, provides opportunities for skills transfer and building local support for projects.	
<input type="checkbox"/>	Enables staff and volunteers to attend more community /regional meetings.	
<input type="checkbox"/>	Ability to fund those things most others won't – e.g. website, coordination and administration tasks, things people don't volunteer for: media	

	relations, evaluation, book-keeping, data entry, attending meetings, etc.	
<input type="checkbox"/>	Other impacts: (please add)	

9. What has this core funding enabled you to do differently?

Please tell us how: discuss the main benefits of receiving this type of core funding using the following two tables.

i) Check off all **quantitative indicators** (e.g. in what ways the dollars were spent, numbers of volunteers, meetings attended, bills paid, etc) that apply and add your comments please!

	Quantitative measurements:	Comments
<input type="checkbox"/>	Number of grants a group gets / applies for	
<input type="checkbox"/>	Increased volunteer base	
<input type="checkbox"/>	Number of volunteers trained	
<input type="checkbox"/>	the number of people group attracted to meetings	
<input type="checkbox"/>	number of meetings and events attended / presented at	
<input type="checkbox"/>	Increased number of public planning processes participated in	
<input type="checkbox"/>	The numbers of land owners contacted	
<input type="checkbox"/>	The percentage of media releases / coverage	
<input type="checkbox"/>	Increased membership	
<input type="checkbox"/>	Increased number of public events / workshops held	
<input type="checkbox"/>	Increase in number of new programs	
<input type="checkbox"/>	Increased number of new relationships	
<input type="checkbox"/>	Increase in number of partnerships	
<input type="checkbox"/>	Local knowledge of stewardship issues increased	
<input type="checkbox"/>	Evaluations done properly and repeatedly	
<input type="checkbox"/>	Ability to secure multi-year funding	
<input type="checkbox"/>	Other...	

ii.) And qualitative indicators (e.g. sense of security, better planning enabled, etc): Check off all that apply and add your comments please.

	Qualitative indicators may include:	Comments
<input type="checkbox"/>	The level of profile a group has in the community	
<input type="checkbox"/>	Positive perspectives of long-time stewardship volunteers as to how the success and culture of a group has changed,	
<input type="checkbox"/>	Documenting success stories and case studies as models to learn from.	
<input type="checkbox"/>	Members and volunteers express satisfaction	
<input type="checkbox"/>	Long term relationships increase	
<input type="checkbox"/>	Establishment of social marketing programs	
<input type="checkbox"/>	Increase in skills learned in the volunteer community	
<input type="checkbox"/>	Increase in skills of staff	
<input type="checkbox"/>	Other funders “get” the benefits of core funding and offer core and endowment funding	
<input type="checkbox"/>	Skills and knowledge transfer from stewardship work to job and home life.	
<input type="checkbox"/>	Changes in OCP’s, bylaws, policy to support sustainability and conservation values.	
<input type="checkbox"/>	New support in community for the group and a more “ecosystem approach” to management	
<input type="checkbox"/>	Reflective practice and evaluation occurs in the group	
<input type="checkbox"/>	Other...	

10. Measurement Indicators

We worked together to identify specific indicators that track the impacts on stewardship groups of receiving core funding. Below is a draft list of indicators of impact and progress: please check off all that the SW! funds were used for by your organization over the past three years:

- ☐ Insurance Costs paid
- ☐ Website development enabled
- ☐ Phone / Utility Costs paid
- ☐ Rental Costs paid

- ☐ Travel Costs covered to meetings and regional gatherings, enabling more representation of our group
- ☐ Conference fees / travel covered
- ☐ Volunteer training
- ☐ More grant applications written
- ☐ Volunteer Coordinator paid
- ☐ Directors better informed, supported
- ☐ Increased volunteer numbers
- ☐ Volunteers supported through special events, food, equipment.
- ☐ Community profile increased through more attendance at events
- ☐ Community profile increased through more press contacts, media articles, press releases.
- ☐ More community projects supported
- ☐ Time to do some forward planning / strategic planning
- ☐ More community partnerships encouraged and supported
- ☐ Other.... Please explain: _____

11. One Major Impact: What stands out for you as the **one main positive impact** on your organization of receiving the core funds for three years?

•

12. Future Funding Models.... Give us your suggestions!

If you could tell funders what type of funding you would like to see in the future (core funding, long term funding, funds for salaries, etc....), what would it be?

What type of funding would be most valuable for your organization to receive? Why?

•

II. Help us Inform and Inspire the Funders - Tell us your Story!

What would you tell your funders? Please tell us a story of how the SW! grant funding enabled your group to succeed in its objectives, sustain itself and its membership, attract and retain volunteers, or anything else you feel the grant supported. One or two paragraphs is fine. The impacts and indicator tables above will hopefully spur some ideas.

•

III. A Picture is Worth a Thousand Words.... Or maybe more core funding.....!

Please include 2-3 photos that illustrate your work –they will be used to canvass funders to help ensure core funding is available for years to come.

THANK YOU for taking part in Stewardship Works! The Stewardship Centre for BC, and our partners have appreciated the time you've taken to test this funding model. As we move forward from the pilot project stage, we will seeking support for a long term funding model to focus on core funding a capacity building. If you have comments regarding how we might improved on the program, please let us know below. We appreciate all feedback that you can provide.

Many thanks!!

Stewardship Works!
Pilot Group Planning Workshop, Kamloops, BC

A Summary of workshop agenda and findings
Sue Staniforth, Evaluation Consultant

November 6, 2008
Best Western Hotel, 1250 Rogers Way, Kamloops

Participants:

Jenny Noble, Scout Island
Amanda Baicke, ARMS
Mike Wallace, Salmon R
Brenda LaCroix, Christina Lake
Rikki Morrison, Christina Lake
Zo Ann Morten, PSF
Erin Viera, FSWP/FBC
Michele Deakin, MVIHES
Naomi Tabata, Coordinator, SCBC
Sue Staniforth, Evaluation Consultant

Meeting Objectives:

- Review the evaluation process and research to date (needs assessment survey and interview data);
- Share successes and challenges with this program and in general;
- Assess their experiences to date with the project: funding process and obligations;
- Collaboratively develop a set of indicators for project success;
- Gather feedback and advice around next steps with the initiative: where and how does the group see SW! progressing in the future?

I. Meeting AGENDA

8:30 am	Breakfast	
9:00 am	Welcome, Introductions	Naomi
9:10 am	Ice Breaker	Sue

Who am I? Six Things list

9:20 am Review Objectives

9:30 am A Bit About the Evaluation Methodology Sue

Developmental Evaluation Process

Developmental evaluation refers to long term, partnering relationships between evaluators and those engaged in innovative initiatives and development.

Developmental evaluation processes provide feedback and support decision-making as an initiative evolves. It is very participatory – and sees the evaluator not as an objective outsider who documents from the sidelines, but as part of a team dedicated to continuous improvement, adaptation and intentional change. This type of evaluation process involves participation from all stakeholders.

Evaluation Process:

Advisory Committee of experienced and interested stakeholders convened, to help select the stewardship groups for the pilot project, and provide ongoing advice / feedback.

Identifying Key Stewardship Groups/ Reporting Tools

AC helped develop specific criteria to select the initial groups.

Produced a drafting and review of the tracking tool for group reporting

Reviewed a draft of interview questions for initial interviews

Summary of Evaluation Interview Findings – Spring 2008

- Pilot Stewardship Groups: Public Outreach a Main Focus
- Stewardship Groups Capacity: Varied and Somewhat Fragile
- Need for a Volunteer Coordinator
- The Changing Nature of Volunteers
- A Limited and Ageing Volunteer Base
- Volunteer Management a Key
- Main Barriers to Success
- Where the Money Goes: Stewardship Works! Funding and other Financial Support
- Stewardship Works Project Process review

10:00 am Round Table Group Sharing

Groups were asked to bring with them:

Tools they use to track their volunteer numbers, members and the number of hours they contribute

Best way they have found to recruit volunteers

Best way they have found to recruit Board members
How they go about training and retaining volunteers
Groups shared tools and techniques identified.

10:30 am refreshment break

10:45 am Group Work

Participants rotated in groups of 3-4 from table to table, review and add ideas to flip chart paper with four main titles and some examples:

Objectives for the two table sessions:

A / to collaboratively develop Short and Long Term Impacts of the SW! core funding grants

B / work to develop relevant Qualitative and Quantitative Indicators of success:
How do we know the core support is working? What does success look like?

11:45 am What are the next steps to move forward? - Naomi

12:00 PM Summary / pick up travel lunches, Farewells

II. Results of the Group Work

A / IMPACTS – Short and Long Term

Potential Short Term impacts of receiving core funding may include:

- removal of the capacity barriers for the stewardship organizations
- increased output from these organizations, including more efficient completion of grant and project tasks
- more security for a group, as basic costs such as rent, insurance, phone bills, etc are covered.
- potential long term planning activities undertaken
- better volunteer management capabilities as expressed by happier, more productive volunteers
- frees up staff to creatively look for more funding sources / do group's mission / vision work
- supporting staff means more community presence
- provides hope for the groups' longevity which increases participation

- improved capacity to lever other funding support by knowing base costs are covered.
- Opportunity for skills transfer and ownership and building local support for project objectives
- Meeting. Learning from and being inspired by peers
- Shared knowledge
- Ability to fund those things most others won't – e.g. website, coordination and administration tasks, things people don't volunteer for – media relations, evaluation, data entry, attending meetings, etc.
- Ability to run programs requiring volunteers

Potential Longer term impacts of receiving core funding:

- The provision of core funding over several years will enable some organizations to get to a higher level of capacity and output, and they will be able to sustain it over time.
- Longer term funding may also enable a group to support a volunteer coordinator over time, bringing stability and continuity to their volunteer program.
- Some stewardship groups may be able to mentor others through meetings, peer evaluations, and sharing of resources such as data bases and plans developed using the core funds.
- The resulting pilot process will provide a model for future policy and program designs to the stewardship community
- Allow more long term strategic planning
- Allow time for investigating conferences, PD opportunities, ways to nurture volunteers
- Stability and continuity for staff and volunteers
- Expansion of training personnel – train the trainer.
- Means corporate knowledge bank stays with the group
- A higher local community profile – more visibility
- Improved local fundraising capacity
- Less dependent on seed funding
- More ability to impact policies and regulations
- Reliability of programs offered ensures community can be involved every year: long term predictability and presence in the community of the group.
- Enables more stringent evaluation process to occur
- Accountability to SW! planning – to get more funds out to more groups – ripple effect. – spread the support
- Can build and maintain long term relationships
- Changing behavior and social norms is labour intensive and long term
- Possible to plan strategically instead of reacting.

- Enabling more community outreach – communities understanding that they are part of the “nature” around them.
- Multi-generational linkages by involving individuals repeatedly over years.
- Funders educated about the benefits of funding core activities and supportive of doing so over the long term.
- Use and acceptance of citizen science monitoring protocols
- Increased ability of organizations to use citizen science methodologies successfully – long term data sets and consistency in collection strategies
- Ability of groups to reflect on practice and evaluate programs
- Increased credibility and appreciation of work by stewardship organizations
- High speed internet!
- Increased public support reflected in government policy and watershed sustainability support mechanisms (conduct a poll to enumerate change0

B / Collaboratively develop specific Indicators of Success with the AC and stewardship groups.

1. Quantitative measurements might include:

the number of grants a group gets, / applies for
 the number of volunteers they train,
 the number of people they attract to meetings,
 The number of meetings and events they attend / present at
 the numbers of land owners they’ve been able to contact,
 the percentage of media coverage.
 Increased membership
 Increased volunteer base
 Increased newspapers, radio / TV articles written by us and about us
 Increased number of public events / workshops held
 Increased number of new relationships
 Increase in number of stakeholders / partnerships
 Increase in number of new programs
 Increased number of programs able to run
 Increased money or percentage for core funding by various funders
 (awareness that it is important to support)
 Increased number of public planning processes participated in
 Local knowledge of stewardship issues increases
 Survey / poll of acceptance of sustainable practices and behavior changes

evaluations done properly and repeatedly / also program assessment of impacts (e.g. % shoreline impacted in 2000 / 20002 / 2004 etc)
ability to secure multi-year funding

2. Qualitative indicators may include:

the level of profile a group has in the community: i.e. does the town council, mayor, community members know of the group,
perspectives of long time stewardship volunteers as to how the success, dynamics and culture of a group has changed,
documenting success stories and case studies as models to learn from.
Members and volunteers express satisfaction
Long term relationships increase – a range of habitat issues increases that we are working on
Establishment of social marketing programs
Baseline creation of community infrastructure to deal with changes created through projects and social marketing
Increase in skills learned in the volunteer community
Increase in skills of staff
Funders “get” the benefits of core funding / governments provide endowment funding
New contacts made with key players
Skills and knowledge transfer from stewardship work to work and home life.
Social behaviour change around key indicators of success (BMPS)
Changes in OCP's, bylaws
New support in community for a whole ecosystem approach versus 1-2 species support
Reflective practice and evaluation occurs in the group (more time for it)
Longevity of core funded groups increase (i.e. still here in 20 years!)
Government policy bylaw OCP provisions that support sustainability values

Appendix 10:**A Summary of Short Term Impacts of Receiving Core Funding,
in order of frequency cited:**

Final Report Data compiled from pilot groups.

Short Term Impacts of Core Funding	Groups citing the impact:	Total:
Ability to fund those things most others won't – e.g. website, coordination and administration tasks, things people don't volunteer for: media relations, evaluation, book-keeping, etc.	OCSA, MVIHES, ARMS, DSS, CLSS, VFG, SINC, CWG, SRWR	9
Support for staff , which enables more community involvement	SC, MVIHES, ARMS, DSS, CLSS, SINC, CWG, SRWR	8
Hope for the groups' longevity which increases participation, provides opportunities for skills transfer and building local support for projects.	OCSA, SC, MVIHES, DSS, CLSS, SINC, CWG, SRWR	8
Removal of capacity barriers for the stewardship organizations	SC, MVIHES, ARMS, CLSS, SINC, CWG, SRWR	7
Increased output from the organization , including more efficient sourcing and completion of grant and project tasks, work on groups' mission and vision, planning	OCSA, SC, MVIHES, CLSS, VFG, SINC, CWG	7
More security for a group , as basic costs such as rent, insurance, phone bills, etc. are covered.	OCSA, SC, MVIHES, DSS, VFG, CWG, SRWR	7
Ability of staff and volunteers to attend more community /regional meetings.	SC, MVIHES, ARMS, CLSS, VFG, SINC, CWG	7
Better volunteer management capabilities , as expressed by happier, more productive volunteers	SC, MVIHES, ARMS, DSS, CLSS, CWG	6

Appendix 11: Self-Reported Uses and Impacts of the SW! Core Funding Dollars

As part of the final years' evaluation research, the participating groups were asked to identify where they applied most of the core funds they received, and how this investment impacted their overall operations and sustainability overall. Data was collected through the final report as well as through phone and email correspondence. This more general data did not always correspond to the more specific information collected in other sections of the report: a limitation of the reporting templates that is discussed in the main body of the evaluation. However, the table below provides a summary of this data, which reflects the main research findings and conclusions of the evaluation.

Use of SW! Core Funding	Major Impacts	% of groups reporting (N = 10)
Funds applied to the "3 R's" of volunteer management: recruitment, retention and recognition: paying for volunteer coordinator, increasing groups' participation at events and meetings, more communications, training, refreshments, tools and/or recognition events.	Better Volunteer Management Increased the number, skills, satisfaction levels and overall sustainability of stewardship volunteers.	100%
Funds used to support staff in searching for, researching and writing grant applications and/or paying for proposal reviewers/auditors.	Additional Grants Leveraged Increased ability to apply for more grants / more success in acquiring them.	100%
Funds used to cover basic costs (rent, phone, hydro, insurance, travel, conference fees, memberships, etc.)	Group Sustainability Increased group sustainability and long term viability/ greater community profile / sense of security, reduction of staff anxiety and burnout.	100%
Funds applied to a wide range of needs: flexible funding noted as important as it can be used where groups needed it the most.	Flexibility of Funds Applied to a wide range of "emergency" areas: a "cushion:" for times when grant funding is still to come in, hiring auditor, maintaining a visitor centre, professional fees, etc.	100%

Funds applied to travel costs of attending community / regional meetings, public events and conferences; meeting with other non-profits, strategic planning sessions to increase impacts.	Increased Capacity to Participate in Community/ Regional Issues Greater ability to participate in community activities, have input into key decisions, increase synergy through linking with other regional groups.	90%
Funds applied to hosting more workshops, participating in more community events and giving presentations.	Increased Community Profile Nurturing greater community connections and partnerships, greater community profile, and increased ability to attract and engage more volunteers.	90%
Funds used in production of group outreach materials, writing media articles, improved website, media interviews and submissions.	Increased Media Outreach and Presence An increased group profile as a result of more outreach materials/ media articles, activities.	80%
Costs covered for staff and/or Board to attend training sessions, workshops and conferences.	Increased Staff /Board Capacity Capacity building within the group, smooth staff transitions, no loss of organizational and project history, and increased long term sustainability.	70%
Funds used for strategic planning sessions: forward planning, evaluation of programs and events, financial planning	Increased Strategic Planning More thorough forward and financial planning enabled, key committees established, evaluations conducted, long term viability of the group supported.	70%
Funds applied to meeting with other stewardship groups, sharing information and resources, partnering on projects, and supporting fledgling initiatives.	Paying it Forward Groups increased relationships and partnerships with other organizations, supported and sponsored new projects in adjoining regions (paying it forward, sharing knowledge: the benefits of multi-faceted partnership networks.	60%

Appendix 12: Some Stories of Core Funding Impacts

Several of the SW! pilot groups submitted specific examples of how the core funds had impacted their work. These were further developed through interviews and emails, and several have been included below: core funding's long term impacts, how it supported a fledgling group, and its effects on a group in crisis.

1. Long-term Impacts of Core Funding

Stewardship Impacts Communities, Governments and Policies

Stewardship and conservation work occurs across complex social and environmental systems, and usually takes years to show concrete results. Stewardship Works! took place over three years – not a long time to explore the long-term potential of this core funding initiative. However, some long-term impacts of the grants were noted, that herald future positive conservation outcomes. Nine of the ten groups noted an increased capacity to participate in community and regional planning and have input into regional decisions. Increased stewardship group participation on government advisory planning councils, watershed committees, sustainability committees, and Official Community Plan councils were all cited – setting the stage for increased influence, authority and agency. Furthermore, seven of the ten groups noted that they had directly impacted local government decisions and processes through their involvement in planning events, policy reviews and community meetings.

Currently working on Riparian Area Protection Guidelines ...to incorporate into the OCP for Area C. the Christina Lake watershed plan and implementation strategy (and stakeholders that have signed an MOU) agree to follow recommended action items. The foreshore inventory and mapping project database is used by the provincial and regional government agencies for foreshore and riparian protection - CLSS

The city now seeks our advice on various topics. We are working with local governments through the sustainability committee and ICSP involvement – SINC

Influencing local government decision-making, community plans and policy development is a long-term indicator of stewardship group success: these significant impacts of core funding show a positive trend that should be followed up with a longer term core funding study.

Financial Stability

The financial stability of all the groups was also noted as a long-term impact of the funding: hiring an auditor to prepare financial statements, enabling a group to do long-term financial planning with staff and board members, researching marketing strategies to raise funds, and paying a bookkeeper to ensure consistency were all activities that the SW! grants supported, and that lead to sustainability.

One of our (MVIHES) biggest fundraising successes recently was the awarding of an RBC Blue Water Project grant in the amount of \$70,000 to conduct our Groundwater Mapping and Education Project in the Englishman River Watershed. We tried three times before we got it and needed financial audits to even be in the running. Thanks to the SW program of core funding, we were able to direct some of that toward an audit. Since receiving the grant (on our third try), there has been a definite upswing in the amount of publicity we receive for that project, providing a lot of public education, and it has paved the way to securing more grants and partnerships. This project, we hope, will become a template for other watersheds that want to protect their ground and surface water for the ecosystem. - MVIHES

Building a Legacy: Sharing Expertise and Resources

Another reported finding by four of the groups that reflects long-term impacts of core funding is that of “sharing the wealth and leaving a legacy”. Having the time and resources to share the knowledge, skills and expertise developed within a stewardship group over the years with other fledgling groups reflects a level of maturity and stability. Non-profit groups are usually in direct competition for funding with similar groups both regionally and provincially, and tend therefore to be somewhat territorial and “protective” of their expertise and networks. Sharing tried and true techniques, local networks, resources and regionally relevant knowledge demonstrates a group’s viability and confidence. Networking and partnering also expands the mutual goals of stewardship organizations and contributes to a consistent and coordinated stewardship approach across a region.

“.... we were able to assist two other watershed groups in fundraising (Murray Creek and Bonaparte River) , and a third watershed group (City of Coquitlam) in watershed planning processes... it bought us the extra time to do this, and some money for gas to get there!” - SRWR

The Murray Creek Stream Rehabilitation Project is unique in this region with the majority of Murray Creek flowing through private farmland within the Nechako Valley. This project is the first one ever in this region and is helping to move the farming ranching community towards practicing water stewardship, while allowing us to rehabilitate those sections that need a helping hand. Although Murray Creek is an important stream, we have 32 additional streams that flow through the Nechako Valley agricultural community and empty into the Nechako River. The lessons learned on this project have allowed us to move forward to work with others...that will.. over the next decades increase the health of not only these streams but those that they flow into.- VFG

A long-term core funding initiative of at least five to ten years is recommended to better identify and highlight the potential impacts, scope and long term outcomes of receiving sustained core funding.

2. Core Funds Supported the Development of a Fledgling Group

The SW! pilot had some initial difficulties recruiting a stewardship group from the Upper Fraser region that met the programs' criteria, due mainly to the small number of groups that are active in this northern, rural area. By Year Two (2009) of the pilot, the Advisory Committee accepted the proposal of the Vanderhoof Fish and Game Club (VFG) to develop a new program that built on their successful creek restoration and agricultural community engagement project (Murray Creek Rehabilitation). The VFG group was able to initiate a strong launch of their new project due to the core funds, which provided such basic needs as a computer and projector to use at community meetings, brochures and display materials, and gas money so volunteers could travel to meet with ranchers on their properties.

The ability to have the materials, including even a computer and projector to conduct meetings with some degree of professionalism is obviously important to "showcase" your project. - VFG

This program has grown rapidly and is now expanding across the entire region, due in part to the core funds that supported the principal group of volunteers in planning, attending meetings, developing presentations and recruiting participants.

This funding has allowed us to move from a one-stream program to propose a new society, that will deal with 32 streams that flow through the Nechako Valley agricultural belt. This has ... created new partnerships, include the Fraser Basin Council, University of Northern BC, Northern Health and the Northern Drinking Water Team, and added volunteers from within the community as Directors. - VFG

A successful stream rehabilitation model is now poised to be adapted and replicated across the region, launched in part by the SW! funds.

3. Core Funds Helped Weather a Crisis and Initiate Renewal

One participating stewardship group - the Como Watershed Group - went through significant struggles over the course of the three-year pilot program, after losing a key founding member and its Board in 2009. During the past 18 months the group struggled to rebuild the organization and maintain its core objectives and activities. At one point the SW! Advisory Committee and the new Board's treasurer discussed removing the Como Watershed Group from the pilot project, due to concerns about its ability to participate in the pilot and continue functioning and delivering projects. However, it was decided to retain the group within the pilot as a relevant case study that profiled the impacts of the loss of leadership in a stewardship organization – a challenge that faces many not-for-profit, volunteer-based groups. The group's challenges and evolution were

documented throughout the last year of the SW! pilot through the reporting templates and phone and email contact.

The SW! funding allowed the CWG to survive a difficult breakdown. With new partnerships, paid bills, some money in our account, and additional funding expected next year, we feel that the worst is already behind us and we look forward to future activities. - CWG

Due to their non-project-based nature, the core funds were able to be used by the group's new Board to rebuild itself. Knowing that these "emergency" funds were on hand provided some security and stability for the new members that helped maintain their optimism and sense of viability: i.e. *"..someone believed in us and our work enough to fund the group"*. The small amount of core funding was sufficient to stabilize the group at a time of great need, through covering basic operational costs and supporting the recruitment of new Board members. The group was also able to maintain their community presence and honour their commitments to previously organized activities during the period of upheaval.