The Chesapeake Bay Trust: Strategic Plan 2015-2020

Approved by the Chesapeake Bay Trust Board of Trustees
May 7, 2015

Mission
The mission of the Chesapeake Bay Trust is to promote public awareness and participation in the restoration and protection of the water quality and aquatic and land resources of the Chesapeake Bay region and other aquatic and land resources of the State. The Trust will engage residents of the region in programs that lead to actions that measurably improve local communities and increase resource stewardship.

Vision
The Trust envisions a future in which the Chesapeake Bay and local waters are healthy and safe, fishable and swimmable, and all residents understand the role they play in improving this critically important natural treasure.

Values
The Trust’s grant-making strategies and philosophy both internal and external are driven by five values:

Accountability and Transparency
The Trust uses open, transparent, and rigorous decision-making processes in its management of contributions made to the Trust, in implementing its grant-making programs, and in operating internally. The Trust holds itself to the highest standards as the steward of contributions made to the Trust.

Grantee Focus
The Trust’s main objective is to provide resources to groups that aim to accomplish natural resource projects. Once through the decision-making process, the success of our grantees’ work is paramount. The Trust is committed to providing the resources and technical assistance our grantees need to accomplish their proposed goals.

Inclusiveness
The watershed will not be restored without a broad range of communities investing in and reaping the benefits of healthy natural resources. The success of these efforts will require increased outreach,
capacity building, and a willingness to listen to and understand the values and specific concerns of diverse communities.

Collaboration

The Trust believes that building strong partnerships with other public and private funders, academic and professional experts, and the grantee community and by convening key stakeholders to develop strategies to forward Bay restoration efforts will advance its mission and build leverage to amplify its resources.

Innovation

The Trust uses the best available natural and social scientific information in the advancement of its programs, and where needs exist, supports the pursuit of new social science and restoration tools. The Trust funds innovative approaches to building the technical, social, and organizational capital needed to advance the Bay restoration effort. Without new ideas, the community will not meet its water quality and habitat goals. The Trust supports a commitment to developing and testing new, efficient ways to accomplish its goals.

Background and Setting

The Chesapeake Bay Trust is poised to take advantage of a range of opportunities presented by unique circumstances at the start of 2015. Interest in and capacity to play a role in restoring natural resources is growing among many audiences in our region. This growth is occurring not only within environmental organizations, but within organizations with missions that are primarily non-environmental such as civic and homeowner associations with an aim to improve neighborhoods; faith-based organizations; organizations that focus on health, poverty, youth, jobs, the arts, education, and agriculture; local governments; landowners like museums, libraries, schools; and more. These organizations have determined that having at least a partial focus on natural resources helps them achieve their primary missions, and that improved natural resources lead to improvements in other areas of communities.

The result has been an increased demand for grants and support for natural resources and environmental education projects that support healthy watersheds – the core services provided by the Trust. The Trust has experienced triple the demand for (and double the availability of) grant funds than it did at the start of the 2010-2015 strategic plan period.

As a non-profit created by the Maryland General Assembly to increase engagement of citizens and institutions in the restoration and protection of the region’s natural resources, the Trust has the opportunity and flexibility to move into key niches in the watershed community, advancing complementary efforts that make up the body of work of our partner Bay organizations. The Trust is part of a larger Bay community context: In 2014, the Bay states signed a new Chesapeake Bay Agreement, outlining a series of goals and outcomes that set the stage for collaborative work among partners. In 2010, the United States Environmental Protection Agency established the Chesapeake Bay Total Maximum Daily Load, a comprehensive “pollution diet” for the region’s streams, creeks, and rivers required under the federal Clean Water Act. In 2009, the President of the United States signed an Executive Order that recognizes the Chesapeake Bay as a national treasure and identifies a suite of federal actions to restore and protect the Bay and its watershed. Various policies, such as the
2011 Maryland Environmental Literacy requirement for high-school students, have further brought watershed issues to the forefront. All of these policies include an emphasis on expanding the discussion and action into new audiences.

At the same time, advances in both the natural and social sciences have resulted in better understanding of what actions need to be taken, both on the human side and natural resource side, to restore watersheds to health. Knowledge gaps are becoming better understood.

**Strategic Direction**

The Trust has reviewed the community context, considered our place in the watershed community, identified new gaps it can fill, and identified gaps it will continue to fill. Over the next five years, the Trust will remain committed to supporting efforts in its three main realms: K-12 environmental education, on-the-ground restoration that engages the community, and community engagement and resource stewardship through grants and programs like the Chesapeake Conservation Corps. The Trust will continue its commitment to diversity and inclusion, using programs to engage communities that have not traditionally identified themselves with the watershed restoration movement. The Trust will continue to develop expertise and provide technical resources to the Bay community about best practices related to both community engagement and restoration, working in collaboration with partners. The Trust will continue to serve as a partner in identifying joint interests with other funders, pooling and administering resources to provide streamlined grant-making for applicants, thereby increasing the amount awarded through grants.

These efforts will be placed in the context of several new actions or newly emphasized themes:

- **Sustainability:** The Trust aims to structure its grant programs to maximize the impact of its grants, and, where appropriate, make more investments with longer-term impact such that environmental benefits are sustained beyond the end of a grant or project term. The Trust will be emphasizing to a greater degree through its calls for proposals and evaluation process three levels of sustainability: The sustainability of the individual project, the sustainability of the organization doing the work, and the sustainability of the “stewardship ethic” created by the project in the community. The Trust also aims to become more sustainable itself by structuring revenue streams that complement each other and maximize longevity.

- **Engagement of additional audiences:** For two reasons, the Trust aims to reach beyond groups already committed to environmental work to new groups, or groups with a large gap between how they could be engaged and how they are currently engaged with natural resource issues. First, given the breadth of the natural resource restoration challenges, the Trust will only garner the resources and individual participation necessary for solutions if it represents and engages all communities in the watershed and develops stewards of our natural resources from wider audiences. Second, given that healthy natural resources improve lives in various ways, populations who are not engaged will be at a disadvantage. Humans have capacity to improve natural resources, and natural resources have the capacity to improve human life.

- **Breaking through Barriers:** The Trust commits to being deliberate about choosing to tackle key barriers in the watershed restoration community that prevent watershed restoration activities or citizen engagement. The Trust will build on its relationships with partners to
prioritize existing limiting factors, which might be in the realms of restoration, social science, natural science, or education, and will focus on tackling a suite of these hurdles during 2015-2020. The Trust will choose barriers that best match its mission and are most appropriate for its niche in the community.

Strategic Priorities

The Trust’s overarching goal is to increase stewardship and quality of land and water resources in Maryland and the broader Chesapeake Bay watershed through grants and other activities that support organizations to advance environmental education, on-the-ground restoration, and community engagement initiatives. To do so, the Trust must raise and steward the funds necessary to support grant programs and other initiatives.

From its creation through 2015, the Trust has made over 10,000 grants and distributed $70 million in funds. The trend over its 30 year history has been investments increasingly steeped in best available restoration, education, and social science; increasingly connected to knowledge about human behavior; and increasingly framed in the context of the broader watershed restoration community. During the period of 2015-2020, the Trust aims to continue its valuable grant-making work and also its trend of continuously incorporating best practices. The Trust’s four main strategies are:

1) Grant-making and program administration: The Trust will implement a series of grants and programs that allow grantee organizations to implement strategic projects that improve stewardship and quality of natural resources. Grant-making focus will be in environmental education, on-the-ground restoration, and community engagement and behavior change.

2) Optimizing Investment: The Trust will continuously review the grant-making activities in the context of three main themes: sustainability, energizing underrepresented and under-engaged audiences, and identifying key barriers that prevent faster improvement of natural resources. The Trust will use an adaptive management approach to refine its grant-making strategies to maximize these three themes.

3) Technical Assistance: The Trust aims to share lessons learned through grant-making with the community, addressing gaps.

4) Revenue Protection and Generation: To support the demand for our grant programs, the Trust will invest resources in maintaining and expanding both unrestricted and restricted sources of funds for work that matches its mission.

The Trust will embark on these strategies each within the context of the other. The four strategic priorities are intricately linked.

Strategic Priority I: Grant-making and Program Administration

The Trust will continue to make grants and manage the Chesapeake Conservation Corps with the same three areas of focus: environmental education, demonstration restoration, and community engagement. Specific grant programs and initiatives will be driven by Strategic Priority II.

A. Environmental Education
The recovery of our watersheds and the future health of our environment, economy, and communities depend on an environmentally literate and engaged citizenry. Acquiring this literacy begins as early as kindergarten. The Trust will remain a key funder of meaningful watershed education experiences and programs for students in formal K-12 school curricula and Chesapeake Conservation Corps work in this area. The Trust has long filled a gap in this realm: providing opportunities through grants and technical assistance at the individual teacher level for outdoor field experiences as well as at the school system and provider levels for broad-scale curriculum change. The Trust will continue to serve this role.

Goal: Support through grant-making educational opportunities that provide K-12 students with the knowledge, skills, and motivation to become better stewards of the environment and the Bay.

Objectives:
1. By 2020, support the establishment of comprehensive and sustainable environmental education programs in at least 10 additional school systems.
2. Collaborate with partners to work towards the goal that all students have at least 3 Meaningful Watershed Educational Experiences (MWEEs) before graduation.
3. Supported by work under Strategic Objective IV, continue to work towards a 1:1 (100%) match from federal, state, and/or private sources for environmental education grants.
4. Expand grant-making and technical assistance to schools in underserved communities, with the goal of full representation of and engagement by diverse communities of the region.
5. Develop measurements of environmental literacy, with partners.

B. Habitat Restoration and Water Quality

The Trust’s restoration programs support habitat restoration and water quality improvement projects that engage volunteers, create models for local communities, build capacity for effective implementation, and demonstrate approaches that can be replicated on a broader scale. The Trust will maintain a portfolio of grant programs that support watershed planning, project design, and implementation of habitat restoration and water quality improvement projects.

Goal: Through grant-making, increase public support for and accelerate the implementation of restoration activities and best management practices (BMPs) needed to restore local watersheds and the Chesapeake Bay.

Objectives:
1. Fund 75-100 habitat restoration and/or water quality improvement projects per year to advance a local community stewardship ethic.
2. Supported by work under Strategic Priority II, enhance sustainability of these projects and incorporate the best available BMP research.
3. Supported by work under Strategic Objective II, help work through barriers and advance at least two innovative and cost-effective BMPs.
4. Supported by work under Strategic Objective IV, maintain at least 1:1 (100%) match from government and/or private partner sources on restoration grants.
5. Expand grant-making and technical assistance to traditionally underserved groups and regions such that the demographics of citizens impacted by Trust programs mirrors those of the regions funded by The Trust.

C. Community Engagement and Capacity Building

Community-led stewardship efforts increase public understanding of watershed challenges, build ownership of local watersheds, and engage more individuals and organizations in actions that improve natural resources. The Trust defines “stewardship” as the active, responsible management of natural resources by individuals, households, businesses, and/or communities. The Trust will continue to support efforts to increase stewardship through grant programs based on review of social scientific research of awareness, engagement, and behavior change best practices. The Trust will emphasize the value of quantifying outcomes from this work, using the best tools available. The Trust will also invest in the capacity of organizations to accomplish this stewardship work.

Goal: Increase, through grant-making, levels of citizen engagement necessary to restore local watersheds and the Chesapeake Bay.

Objectives:
1. Increase adoption of stewardship practices at the household and/or community level.
2. Supported by work under Strategic Priority II, build towards increasing “stewardship ethic” in communities, develop a way to prioritize projects that increase community stewardship ethic, and develop a way to measure this parameter.
3. Increase capacity of organizations to accomplish community-level actions needed to improve the health of the region’s natural resources.
4. Maintain a 1:1 (100%) match from federal, state, and/or private sources for community engagement and capacity building grants.
5. Expand grant-making and technical assistance to traditionally underserved groups and regions such that the demographics of citizens impacted by Trust programs mirrors those of the regions funded by The Trust.

Strategic Priority II: Optimizing Investment

Grant making strategies and themes over the coming five-year period will not be based on a static set of criteria. Instead, each annual grant-making cycle will be informed by work in three main areas and goals refined in these areas. The Trust is committing to developing and refining a grant-making framework based on three concepts: reaching and engaging key under-engaged audiences, increasing sustainability of our investments, and breaking through barriers.

A. Reaching and Engaging Under-engaged and Underrepresented Audiences

The Trust intends to explore how to reach people and communities who benefit from healthy natural resources but may not fully engage in natural resource issues or serve as stewards. Communities sometimes miss the connection between their primary concerns and watershed
issues. The watershed restoration and protection effort will require more than involvement only by groups with a primarily environmental mission. Failure to engage additional audiences, and create environmental leadership among them, and to fully engage marginally engaged audiences will result in a loss of potential.

**Goal:** Identify audiences who are less engaged or represented than they could or should be, and provide an opportunity for these audiences to participate and to become stewards through grant-making work in Strategic Priority I above.

**Objectives:**
1. Conduct a stewardship census, an analysis of potential audience types and communities, gaps between current natural resource stewardship activity level and potential level, and impact potential.
2. Select one or more key audiences and establish a strategy to connect.
3. Pilot modified grant and outreach approaches aimed at more fully engaging these audiences and creating stewardship opportunities.

**B. Sustainability: Identifying ways to extend the benefits of key grant investments**

The Trust will embark on an analysis of ways to maximize sustainability of projects it funds, in cases in which impact is maximized by longevity. The Trust plans to examine three levels of sustainability, determine factors that maximize sustainability of each, and incorporate those into Strategic Priority I:

a. **Sustainability of the individual grant-funded project.** What factors lead to longevity of a project? Full partnerships? Community support? Proper maintenance plans for on-the-ground work? Consideration of changing climate? Our goal is to identify these factors, then incorporate them as criteria in project selection.

b. **Sustainability of the organization leading the work.** Will a one-time or short-term investment in an organization contribute to sustainability of that organization and additional projects and work in the future?

c. **Maximization of development of community “stewardship ethic.”**

**Goal:** Increase long-term impact of grant investments, leading to better performing projects and greater, longer-lasting development of community stewardship ethic.

**Objectives:**
1) Conduct an analysis of factors that lead to sustainability of the project, organization, and a robust community stewardship ethic.
2) Incorporate those factors into grant program criteria as part of Strategic Priority I.

**C. Breaking Through Barriers Limiting Watershed Restoration and Protection**

The Trust has a unique opportunity to apply resources to problems that other organizations cannot. Because of this flexibility and the importance of identifying limiting steps in the
watershed restoration effort, the Trust will deliberately invest resources in the identification of key barriers in the community that slow or prevent watershed restoration activities or citizen engagement. While many of the Trust’s grant programs and individual projects by their nature address key barriers with the goal of breaking through those barriers, the intent of this component is to pledge additional resources that may extend beyond grant-making. In the first year of the new Strategic Plan and periodically thereafter, the Trust through consultation with community partners will compile a list of key barriers to accomplishing its mission of Bay restoration and citizen stewardship, will analyze each barrier for relevancy and feasibility, will establish a budget and will create a strategy for tackling the barrier(s).

Goal: Break through barriers that limit or slow watershed restoration and protection in key areas closely aligned with the Trust’s mission and Bay community context.

Objectives:
1) Conduct an analysis to identify areas in which the Trust could serve as a catalyst.
2) Use the following criteria to evaluate each identified barrier for potential Trust involvement:
   a. impact
   b. likelihood of success
   c. connection to the Trust’s mission and goals
   d. resources required.
3) Apply focused resources in one of more areas for a finite period, allowing for accelerated implementation beyond the period of Trust investment.

Strategic Priority III. Technical Assistance

The Trust will remain committed not only to learning from grants it makes and from analyses it undertakes, but to pass that information back to the individuals and communities working to restore and protect the watershed. In this way, too, the Trust aims to increase the sustainability of the watershed effort.

Goal: Develop and deliver scientific and technical information back to grantees and the broader watershed restoration community.

Objectives:
1. Increase availability and use of information on best practices in watershed restoration and social science for increasing individual and community stewardship via environmental education, on-the-ground watershed and habitat restoration, and outreach and community engagement projects.
2. Disseminate information to the grantee and broader Bay restoration community about successful grants, projects, and approaches funded through the Trust’s environmental education, restoration, and community engagement and capacity building programs.
3. Provide training and technical assistance to grantees on effective environmental education approaches, restoration practices, and community engagement, communications, and capacity building strategies.
4. Partner with other funders and educators to advance evaluation methods to measure the impacts of environmental education programs.

Strategic Priority IV. Revenue Enhancement and Diversification

To support the Trust’s grant making work and increased demand for resources, the Trust will develop a rigorous strategy to protect and grow its revenue streams.

A. Unrestricted Revenue

Unrestricted revenue serves as the base of the Trust’s support. It allows the Trust to leverage other restricted funding support and allows much of the flexibility in the Trust’s strategies.

Goal: Increase unrestricted revenue base in order to meet the growing demand for funds from an expanding grantee community.

Objectives:
1. Preserve the revenue stream generated by the Treasure the Chesapeake program.
2. Preserve the revenue stream of the Chesapeake and Endangered Species tax checkoff program.
3. Promote participation in the Bay plate, income tax check-off, and other voluntary contribution programs to the Trust.
4. Expand the Trust’s direct donor campaign, transforming into a large donor effort.
5. Aim to develop a new public financing mechanism to support the Trust’s grant-making mission and intended to grow and diversify its revenue base, placing a premium on the funding sources that are most reliable and afford the Trust maximum autonomy.
6. Explore opportunities to create additional state-wide or regional voluntary contribution programs.
7. Research strategies that maximize sustainability of funding streams and therefore the Trust, such as establishing an endowment.
8. Maintain communications programs to support recognition of grant programs, projects, and outcomes intended to support revenue enhancement, in addition to grantee participation.
9. Maintain and develop communications and marketing programs to support the license plate program and the tax checkoff program, with a goal to maintain the number of individuals who retain and renew their bay plates and contribute at tax time.
10. Maintain and develop communications and marketing programs to raise the profile of the Trust and facilitate other unrestricted and restricted development mechanisms.

B. Restricted Revenue

Restricted revenue sources have been for the past 10 years important sources of revenue for the Trust, allowing the Trust to expand; attract new audiences; engage in new types of projects; connect with new technical experts; and make larger, more sustainable grants. Restricted resources have also been used to support certain types of projects historically supported by unrestricted funding; allowing the Trust to invest its unrestricted revenue in new areas and fill gaps unfilled by other funders or Bay community members.
Goal: Increase restricted revenue base in order to meet the growing demand for funds from an expanding grantee community.

Objectives:
1. Identify and attract funding partnerships from among public agencies (federal, state, and local) and private sources that would allow advancement of the Trust’s core mission and values.
2. Manage a portfolio of funding partners whose goals align with those of the Trust.
3. Maintain and develop communications, marketing, and administrative programs to support new and maintain existing restricted revenue partnerships.
4. Through communications efforts, elevate public awareness of the Trust and its work as an efficient, accountable, value-adding, and effective grant-maker for Bay and local watershed restoration.

Implementation

The Trust will translate this five-year strategic plan on an annual basis into a work program that articulates clear annual goals and is aligned with the annual budget process. This annual Trust work plan will in turn be divided into departmental goals, individual staff work programs, and a board work program divided into board committee responsibilities.