



Chesapeake Bay Trust Strategic Plan 2020-2025

Mission

The Chesapeake Bay Trust engages and empowers diverse groups to take actions that enrich natural resources and local communities of the Chesapeake Bay region.

Vision

The Chesapeake Bay and local watersheds are healthy and safe, our waters are fishable and swimmable, local communities benefit from these healthy resources, and everyone participates in restoring and protecting our natural resource treasures.

Values

Learning: The Trust subscribes to the philosophy that the only constant is change: New technologies are proposed that need to be tested and considered; new concepts are raised that challenge life-long models; and goal posts sometimes seem to be moving, as with the impact of climate change on our watershed goals. The Trust is constantly learning from a wide range of constituencies, including our collaborators, our grantees, and our critics, and is willing and able to embrace new approaches that help us meet our goals.

Science and Innovation: The Trust uses the best available, objective natural and social scientific information to guide our actions. Where needs or information gaps exist, the Trust supports the pursuit of new social science and restoration tools and information. The Trust supports development and testing of innovative and efficient approaches to building the technical, social, and organizational capital needed to advance the Bay restoration effort while at the same time improving communities' economic and public health. Without new ideas, the Trust will not realize our vision and the community will not meet its water quality and habitat goals.

Engagement of a grantee community: The Trust believes that our vision of healthy natural resources for all relies on a wide range of types of groups, and no one sector can do it all. We strongly believe in the ability of local groups on the ground, including groups that don't focus primarily on natural resource issues, to play a role to complement the efforts of other sectors, like government. Much power exists in giving on-the-ground groups, large and small alike, ownership of projects that make a difference. Grants can provide the means for that process to occur.

Diversity and Inclusion: The watershed will not be restored without a broad range of communities recognizing and investing in their natural resources, reaping the benefits of a healthier environment and the economic and health co-benefits that come with that investment. 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, often under-engaged communities.

Fiscal responsibility: Every dollar matters in the effort to restore and protect our natural resources. The Trust works hard to balance costs to maximize the dollars applied to solving mission-related problems and maximize

the effects/results from those investments. The Trust holds itself to the highest standards as the steward of contributions made to the Trust.

Transparency and Accountability: 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 is committed to providing clear public communication of the results and effectiveness of our investments in achieving our goals.

Strengths

The Trust is characterized by several unique strengths that support our values and play a role in the types of strategies it will use to advance our vision during 2020-2025.

Leadership: Given the Trust's values, characteristics, and strengths, the organization will continue to take a leadership role in natural resources restoration.

Flexibility: The Trust is nimble and reacts quickly to changing science, changing conditions, and changing information. We evaluate and, if warranted, support new approaches when improved management measures, technologies, or better scientific information come to our attention, and we change course when we have learned new information that makes a previous direction inadvisable.

Independence and objectivity: The statute that created the Trust enables it to be independent of various types of pressures and use rigorous, independent, technical peer review processes in its grant-making and other programs.

Trust: We are a trusted third-party that advances objective information. Our goals are to seek out and listen to diverse views, then use the best available science and other information provided by stakeholders to advance our vision.

Grant-making: The Trust is known in the community as a grant maker, supporting organizations large and small, environmental and other issue-focused. Our 35 years of experience has led to refinements in process that we have shared with others.

Critical Issues

Several key challenges stand in the way of achieving our vision of a future in which the Chesapeake Bay and local watersheds are healthy and safe, our waters are fishable and swimmable, local communities benefit from these healthy resources, and everyone participates in restoring and protecting our natural resource treasures. In consultation with our stakeholders, we have identified four critical issues that we think the Trust, given our values and strengths, is well-poised to address in the 2020-2025 time period.

1) Climate change impacts on Chesapeake communities and natural resource goals. Global climate is changing, and its effects are impacting our local communities and the entire watershed restoration effort. Storms are already becoming more intense and rainfall volume in storms is greater, rendering stormwater practices less effective. Flooding events that increase stormwater pollution are becoming more common. Sea level is rising, which is displacing people and communities, particularly underserved communities; endangering businesses; squeezing available wetland habitat acres; and threatening existing shoreline erosion control practices. The Chesapeake and neighboring systems are some of the best studied estuaries in the world: More than almost any other system, we know what the problems are, and we know generally how to solve them. However, as the target continues to move due to climate change, we find ourselves needing to increase our efforts if we are to meet all our current goals. We must factor in impacts of climate change to our goals, and we must factor in impacts of climate change on the human engagement in Chesapeake and Coastal Bays recovery. Communities

that are threatened by sea level rise, increasing flooding and more frequent extreme temperature days are likely to have more pressing priorities than water quality and habitat loss.

2) Competing priorities for people's time and attention. We know that healthy natural resources benefit human life and that all people have the capacity to improve natural resources. We know that if natural resources were improved, humans would benefit. We also know that if more people were engaged, natural resource recovery and protection would happen more quickly. Too small a percentage of the population participates in activities or behaviors that would benefit natural resources. A significant percentage of the population either is not fully aware of connections between topics they prioritize and natural resources, or understandably do not have space in their lives to participate in behaviors that reverse the trend. For a large number of people, there are bigger priorities than watershed health, such as public health, jobs, economy, crime, education. The Trust has long understood that many of these issues *are* linked to watershed health in many ways: that practices aimed to improve one also have benefit in other areas; however, the perceived disconnect remains a critical issue that must be addressed.

3) Bay habitats and water quality remain impaired. After decades of work and large amount of investment, many scientists report that we are turning the corner in watershed health. However, significant impairments remain and new(er) ones, like micro-plastic pollution and threats from climate change, are becoming better understood. The pace of improvement is a critical issue: We risk disengagement, fear of expense, and fatigue without faster measurable progress.

4) Limited available resources: Especially with the challenge added by climate change, most reports suggest that we have a long way to go in restoring bay habitat and water quality, and financial resources appear to be limiting. Even within the Trust's stakeholder community, during the period of the previous strategic plan, the Trust received requests for two to three times the funding available. More cost-effective solutions, synergies in solutions, and/or more resources are needed. An opportunity exists to engage a larger number of audiences in activities that improve natural resources while also advancing other community goals that are priorities for those audiences.

Chesapeake Bay Trust Role and Strategies

The Trust examined these four critical issues, considered our strengths and values, and identified several ways we can use our unique skills to advance progress towards our vision. The Trust believes we can deploy our resources in ways that engage a greater proportion of our region's residents, that identify co-benefits across community and environmental goals, that take into account changing climate and conditions, and as a result spark acceleration of and cost-effectiveness in watershed health improvements and protections.

In applying the Trust's strengths and skills in tackling pieces of the critical issues above, the Trust will use a variety of methods. The method chosen depends on what we know about the critical issue and its potential solutions, and the capacity for organizations to employ those solutions. The Trust will offer services in convening, collaboration and network building, training and technical assistance, capacity building, and grant-making. Our grant-making will support a wide range of activities, including efforts of other organizations to convene, collaborate, network build, train, assist, and build capacity. In addition, we will continue to collaborate with other funders in these efforts, and continue to build our own internal capacity so that we can provide these services in perpetuity.

1. Convening

Goal: The Trust convenes key communities to identify solutions to critical issues or paths of action.

In many cases, the natural resource community is not aligned in how to solve a particular critical issue, significant debates exist, or the issue is new. In such cases, organizations may not be ready for grant resources to tackle the issue, or the types of grant investments that should be made are not clear. In such cases, when the

issue is one that the Trust identifies as a barrier to advancement of its mission or vision, the Trust may convene entities to attempt to identify possible solutions.

Issues that fall into this category might change annually; therefore, specific topics will be proposed in annual work plans prepared by the Trust that emanate from this strategic plan. Example topics include restoration practices about which there is debate; community response to climate change; and co-benefits of restoration measures that benefit the communities being asked to participate, particularly with respect to the economy, jobs, and public health.

2. Collaboration and Network Building

Goal: The Trust supports collaborative activities among entities, organizations, and individuals in pursuit of solutions to key critical issues described above.

With some critical issues, agreement exists on the solutions, but organizations are not working together efficiently to solve the issues. Because of the Trust's role as a convener and funder, we have a strong understanding of the types of entities working on issues related to our mission and vision and can help facilitate collaboration to find economies of scale and efficiencies. Entities can often be more cost-effective working along the continuum of collaboration, sharing like functions, divvying up duties, expanding ideas, and learning from each other. The Trust will evaluate critical issues and seek to convene partner organizations interested in working together in various capacities to leverage resources and coordinate activities to better achieve shared goals.

3. Training and Technical Assistance

Goal: The Trust packages training, technical, and funding resources to increase knowledge, self-efficacy, and capacity to accelerate progress towards a shared vision.

With some critical issues, consensus exists on solutions and the right entities are working together in efficient ways. In those cases, the entities or collaborative networks might need a variety of resources to help them solve the issue. The Trust provides a wide range of resources. While grants and financial resources are an important tool to facilitate engagement of entities in accomplishing our shared vision, other types of tools may also be more effective or efficient. In some cases, funds for project costs may not be a limiting step for an entity, but rather technical assistance or training is needed. In still other cases, the Trust may be able to package assistance for multiple entities in a cost-effective way, providing resources such as group trainings or human resources support, such as that offered through the Chesapeake Conservation Corps program. The Trust will continue to be open and flexible to various methods of supplementing grant programs to help address critical issues.

Providing a space for entities to share experiences and learn from each other can help with the fourth critical issue identified above, leveraging resources and improving efficiencies. In addition, there may be efforts in new areas in which organizations do not yet have the capacity to act, such that providing grants is not yet an option.

4. Capacity Building

Goal: The Trust provides tools to create capacity within groups and organizations important in achieving our vision.

To address the natural resources critical issues above, the Trust must engage new audiences that may have not participated in environmental community projects previously, and effective investments in this work will have long-term impact, ideally in perpetuity. For such a lofty goal to be realized, entities in which we invest must have the capacity not just to conduct their work successfully, but to realize a lasting change in stewardship ethic

that extends to future organization staff and the community members who are benefiting. Organizational or other types of capacity cannot be a barrier. Therefore the Trust will provide key groups the tools by which to become effective over the long-term. The Trust is open to supporting capacity building work in any element that increases the effectiveness and sustainability of an organization, both internal and external.

5. Grant-making

Goal: If and when a barrier to advancing the goals above is identified, the Trust will make grants and fund other types of non-grant awards to remove that barrier.

When solutions to a critical issue are known, and when groups to solve that issue exist and have the capacity to address it, often the limiting factor is inadequate financial resources. The Trust's primary function for the past several decades has been to provide grants for work in K-12 environmental education, on-the-ground watershed restoration, community engagement, capacity-building, and science where there are gaps in knowledge. The Trust will continue to provide grants in these realms, with our strength of flexibility engaged to constantly refine funding priorities. In addition, we will continue to offer this grant-making service to other funders, develop funder collaborations, and build our reputation as the "community foundation" for the Chesapeake. We will employ the following grant-related strategies:

a) *Diversity and Inclusion*

Goal: The suite of grants the Trust funds includes a wide range of types of organizations, each with the potential to continue to advance natural resource stewardship into the future.

Supporting a wide diversity of organizations that participate in our region's natural resource solutions addresses the second and third critical issues above. Specific aspects include:

- a. Making grants to a wide range of diverse and high-impact groups, both organizations with environmental missions and those without, in ways that the funded activities can spark or advance a natural resource stewardship ethic beyond the duration of the grant period. Because resources are limited, we need to identify ways our funds can work towards the vision beyond the initial project investment.
- b. Articulating co-benefits of natural resource improvement, and being open to investments that support communities' primary needs. The primary way to engage a larger set of audiences is to show connections between their priorities and natural resources.

b) *Sustainability and climate*

Goal: The suite of grants the Trust funds has potential to remain effective and impactful long into the future.

Considering sustainability of investments, particularly in light of climate change, addresses the first critical issue above. Grant investments will be made in actions that have the highest likelihood of lasting effects. Climate change manifestations in our area have the potential to affect the durability of any project, whether an on-the-ground restoration project or a community engagement effort. The Trust will consider the effects of climate change in the construction of all grant programs and their review criteria.

c) *Supporting science in cases of unknowns*

Goal: The Trust's grant investments are based on the best available science, and where questions about efficacy of a practice, technique, or theory exist, the Trust helps obtain answers.

- d) The Trust is not primarily a research funder. However, where gaps in knowledge exist that present challenges for programmatic grant-making or barriers to advancement of restoration actions, the Trust will invest in applied research and discovery to remove the barrier in any scientific realm (natural, physical, or social science), addressing the third and fourth critical issues identified above.

6. Funder Collaboration and Pooling Resources

Goal: The Trust will work to expand its funding pools, attracting funders with similar goals.

The Trust has long collaborated with other funders, government and private, who share similar goals. We create pools of funds that have several benefits: Funders can leverage their resources with others, having greater impact, which helps address the fourth critical issue above. Administrative time for both funders and grantees is diminished with one application process. Cross-pollination of ideas occurs across funders. Our strengths of flexibility and grant-making and our value of fiscal responsibility support this role. The Trust will continue to serve this function and work to expand our pooling options for other funding partners throughout the Chesapeake watershed.

7. Internal Capacity Building/Capacity Maintenance

Goal: The Trust will remain a well-run, fiscally responsible, well-resourced organization and will be supported by long-term, perpetual sources of revenue.

The strategies listed above are designed to tackle the critical issues standing in the way of the realization of our vision. To be successful in deploying these strategies, the Trust needs to ensure that it builds and maintains the support tools necessary for our own organization to be sustainable in the management and fundraising realms. In terms of management and governance, the Trust will use the best available tools to ensure accountable, transparent, cost-effective, fiscally responsible operations consistent with our values. In the fundraising realm, the Trust will preserve and aim to grow our existing unrestricted revenue streams including the Protect the Chesapeake license plate; the donation line on the Maryland state income tax form; donations through hunting, fishing, and boating license purchases; annual giving; and others. We also plan to explore and implement ways to ensure we can offer resources for a long time to come, ideally in perpetuity. The need for the types of support the Trust offers will likely always exist: While our vision of a restored Chesapeake and other regional watersheds will surely be realized, resources will be needed to maintain the newly healthy watersheds, and the types of organizations supported by Trust grants and programs will always have a role. As a result, the Trust has articulated a goal of achieving long-term, perpetual support in the form of an endowment, and aims to make significant progress on growing the endowment over the course of the 2020-2025 strategic plan.

Implementation

The Trust translates its five-year strategic plan into annual work plans that articulate clear annual goals and is aligned with the annual budget process. Each annual Trust work plan will, in turn, be divided into department goals, individual staff work programs, and a board work program divided into board committee responsibilities. Once per year, progress on the strategic plan will be evaluated and adjustments made as needed.