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 Bay 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 targets sometimes seem to be moving, as with the impact of climate change on our watershed goals. The Bay 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 Bay Trust uses the best available, objective natural and social scientific information to guide our actions. Where needs or information gaps exist, the Bay Trust supports the pursuit of new social science and restoration tools and information. The Bay 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 Bay Trust will not realize our vision and the community will not meet its water quality and habitat goals.

Engagement of a grantee community: The Bay 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: Our watersheds 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 Bay 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 Bay Trust holds itself to the highest standards as the steward of contributions made to the Bay Trust.

**Transparency and Accountability:** The Bay Trust uses open, transparent, and rigorous decision-making processes in its management of contributions made to the Bay Trust, in implementing its grant-making programs, and in its internal operations. The Bay Trust is committed to providing clear public communication of the results and effectiveness of our investments in achieving our goals.

**Strengths**

The Chesapeake Bay 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.

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

**Flexibility:** The Bay 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 Bay 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 Bay Trust is known in the community as a grant maker, supporting organizations large and small alike, experienced and new to grant-seeking alike, and environmental and other issue-focused alike. Our experience since our founding in 1985 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 Bay Trust, given our values and strengths, is well-poised to address.

1) **Despite decades of work and investment of billions of federal, state, local, and private dollars, Bay habitats and water quality remain impaired.** 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 generally how to solve them. Each watershed jurisdiction has been allocated a “pollution diet” under the auspices of the federal Clean Water Act and has crafted a Watershed Implementation Plan to meet those allocations by 2025. Models predict that those pollution reductions should result in a restored Bay. However, while the Bay is not getting worse, significant impairments remain such that we are unlikely to meet 2025 goals, and additional impairments, like micro-plastic pollution and toxics, are becoming recognized. The pace of improvement is a critical issue: We risk disengagement, fear of expense, and fatigue without faster measurable progress.

2) **The targets are moving.** The original models assumed a relatively static level of stressors, focusing on actions needed to reduce a set number of pounds of pollutants to get to a certain level of pollution loads to the Bay (the
“pollution diet”). However, stressors are not static and are in fact worsening, resulting in the need to reduce even more pounds of pollutants than originally thought. Examples of changing stressors include climate change, unexpected and therefore unmodeled inputs of pollutants, and land use changes (population and development are increasing). Climate change is resulting in more intense storms that produce more rainfall, rendering stormwater practices less effective than originally thought. Flooding events that increase stormwater pollution are becoming more common. Sea level is rising, displacing people and communities; endangering businesses; squeezing available tidal wetland habitat acres; and threatening existing shoreline erosion control practices. Unexpected sources of pollution such as infrastructure failures in sewer lines and wastewater treatment facilities can be on the same order of magnitude as expensive reductions accomplished by other entire sectors, effectively offsetting those positive gains. Different land use types emit different levels of pollution, with mature forest the least emitting. As mature forest acres are transformed to other land use types, both during the transformation process and after the acres are transformed, the acres have a different pollution footprint. In addition, also contributing to changing targets, unknowns about the efficacy of some of our best management practices are emerging. As the pollution reduction target continues to move due to these forces, we find ourselves needing to increase our efforts if we are to meet our current goals.

3) Gap in available resources: The Chesapeake Bay Accountability project estimates that $1.6 billion is spent annually by federal, state, and local government sources to achieve Bay restoration goals; however, at least one source estimates actual annual need is $5 billion (Figure 1). With unmodeled changes in climate and land use and potentially unaccounted-for pollution sources, this figure may be even higher. As we accept that we will not achieve key Chesapeake Bay Agreement 2025 goals, it is becoming clearer that whatever the true annual funding need is, not enough of the “right” actions are being taken now. We have two ways to close the funding gap: a) Identify more cost-effective solutions and/or synergies in solutions to reduce the overall price tag, and b) bring more resources to the table.

Figure 1: Illustration of current picture of needed and available resources (A), and desired end goal with no gap between needed and available resources (B)
4) Competing priorities for people’s time and attention. Closing or even maintaining the funding gap will be difficult if the will does not exist for investment. An opportunity exists to engage a larger number of audiences in activities that improve natural resources, thereby bringing more resources to the table, while also advancing other community goals that are priorities for those audiences. 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 faster. 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 activities that meet these goals. For many people, there are bigger priorities than watershed health, such as public health, jobs, economy, crime, and education. The Bay 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.

Chesapeake Bay Trust Role and Strategies

The Chesapeake Bay 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.

1) Closing the Resource/Action Gap Strategy 1: Increasing effectiveness of practices to reduce overall watershed improvement costs, making each investment more impactful. Two ways exist to close the gap between available actions/resources ($1.6 billion annually) and needed actions/resources (~$5 billion annually, Figure 1). The first involves reducing the total cost of achieving the community’s collective vision of a restored and protected Chesapeake watershed. The Bay Trust’s role in this larger effort to reduce the overall price tag will be:
   a. Improving best management practice (BMP) efficiency (e.g., $/pollutant reduction output) in the restoration, conservation, engagement, and education realms by:
      i. investing in understanding and improving efficiencies/performance of current BMPs;
      ii. considering new, more efficient and effective practices;
      iii. understanding longevity, sustainability, and (where appropriate) maintenance needs of BMPs; and
      iv. disseminating information on BMPs to end users.
   b. Helping to coordinate deployment of existing resources by the Bay Trust and others;
   c. Helping to aggregate existing resources under the Bay Trust’s umbrella of community-based programs, where appropriate. Aggregating resources provides a “one-stop shop” for grantees, reducing administrative costs for both funders and grantees.
   d. Helping identify:
      i. cases in which dollars should be targeted solely to maximize immediate natural resource benefits (e.g., geographically), and
      ii. cases in which dollars should be invested to maximize human engagement and therefore maximize future natural resource benefits/action to support watershed initiatives.

   Goal: Resources deployed as effectively as possible

2) Closing the Resource/Action Gap Strategy 2: More resources. A second way to close the gap between needed and available resources/actions would be to attract more resources/activity. Improved watershed health affects many aspects of society: human health, jobs, economy, quality of life, recreation, and more. The Bay Trust will pursue several strategies to attract new resources by connecting these co-benefits to watershed restoration and protection:
   a. Attracting new funding from individuals, corporations, foundations, government partners, and other entities that previously had not supported watershed efforts to deliver a step change in funding;
b. Developing and/or supporting creative approaches to encourage individuals and entities to implement BMPs on properties over which they have agency/influence;
c. Ensuring that a pool of individuals exists for (a) and (b) above by continuously building an environmental stewardship ethic among key audiences.

Goal: New resources – both dollars and time - brought to the table, contributing to greater ability to accomplish our vision

3) Ensuring that Trust resources continue to deliver high impact results. The Bay Trust will continue to invest and develop its team, systems, and processes to effectively and efficiently deliver our programs and will continue to raise funds to support this work.

Goal: Trust systems and processes allow implementation of high impact projects, ensuring that existing annual resources are contributing efficiently to accomplishing our vision.

Chesapeake Bay Trust Methods

The Chesapeake Bay Trust will use a variety of methods to implement the strategies outlined above.

1. Convening: The Bay 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, when the issue is one that the Bay Trust identifies as a barrier to advancement of its mission or vision, the Bay Trust will convene entities to attempt to identify possible solutions.

2. Collaboration and Network Building: The Bay Trust supports collaborative activities among entities, organizations, and individuals in pursuit of solutions to key critical issues described earlier.

With some critical issues, agreement exists on the solutions, but organizations are not working together efficiently to solve the issues. 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 Bay Trust will evaluate critical issues and seek to convene partner organizations to leverage resources and coordinate activities to better achieve shared goals.

3. Training and Technical Assistance: The Bay 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(s). The Bay Trust provides a wide range of resources. The Bay 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 and Climate Corps program.

4. Capacity Building: The Bay Trust provides tools to create capacity within groups and organizations important in achieving our vision.

To address the natural resources critical issues above, the Bay 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 Bay Trust will provide key groups the tools by which to become effective over the long-term. The Bay 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: The Bay Trust will make grants and fund other types of non-grant awards.

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 Bay 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, land protection, community engagement, capacity-building, and science where there are gaps in knowledge. The Bay 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. Our grant-making will be guided by the following principles:

a) **Supporting science in cases of unknowns:** The Bay Trust’s grant investments are based on the best available science, and where questions about efficacy of a practice, technique, or theory exist, the Bay Trust helps obtain answers.

In cases in which gaps in knowledge exist that present challenges for programmatic grant-making or barriers to advancement of restoration actions, the Bay Trust will invest in applied research and discovery to remove the barrier in any scientific realm (natural, physical, or social science).

b) **Sustainability and climate:** The suite of grants the Bay Trust funds has potential to remain effective and impactful long into the future.

Considering sustainability of investments, particularly in light of climate change, ensures a high 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 Bay Trust will consider the effects of climate change in the construction of all grant programs and their review criteria.

c) **Diversity and Inclusion:** The suite of grants the Bay 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 critical issues outlined above. The Bay Trust will:

a. Make 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. Articulate 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.

6. Funder Collaboration and Pooling Resources: The Bay Trust will expand its funding pools, attracting funders with similar goals.

The Bay 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 Bay Trust will work to pool our own funding sources wherever possible to realize these same benefits. The Bay 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: The Bay 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 Bay Trust needs to ensure that we build and maintain the support tools necessary for our own organization to be sustainable in the management and fundraising realms. In terms of management and governance, the Bay Trust will use the best available tools to ensure accountable, transparent, cost-effective, and fiscally responsible operations consistent with our values. In the fundraising realm, the Bay 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 Bay 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 Bay 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 Chesapeake Bay Trust translates its five-year strategic plan into annual work plans that articulate clear annual goals and are aligned with the annual budget process. Each annual Bay 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.