



The Chesapeake Bay Trust: Strategic Plan 2010-2015

Introduction

The Chesapeake Bay Trust's highest priority is to increase individual and community stewardship of our region's land and water resources, which all impact the health of the Chesapeake Bay. We know from public opinion research that residents of Maryland and the greater Chesapeake Bay watershed have strong conservation values, especially as relates to the Bay and the rivers and streams that feed it. At the same time, many people are uncertain about what they can and should do to become better stewards of the environment. Many lack access to information about where they can volunteer or learn more about practical changes they can make in their lifestyles, to their homes, and in their communities.

The Trust seeks to fill this gap by building local, community-based support for Bay and local watershed restoration efforts. Our work supports the long-term collaborative effort by federal and state officials to develop and implement a comprehensive recovery plan for the Bay. And it complements the research, policy advocacy, and community organizing work of environmental and conservation organizations across the region.

But our distinctive role as a public foundation is to work from the ground up to build local capacity for effective implementation of restoration and protection strategies. Over the next five years, we will support organizations that connect communities to their local watersheds through environmental education programs, on-the-ground restoration projects, and community outreach and engagement activities. We will continue our commitment to diversity and inclusion, using our programs to engage communities that have not traditionally identified themselves with the current Bay restoration movement – and seeking through this engagement to broaden our understanding of the communities and issues that will define the Bay restoration movement of tomorrow. In a new role for the Trust, we will develop expertise and provide information resources to the Bay community about best practices related to community engagement, demonstration-scale restoration, and communications that we learn to be critical to increasing stewardship.

As a means of advancing its Bay stewardship mission, the Trust will draw more attention to the distinctive brand of civic philanthropy it practices. Through its Bay plate, income-tax check off,

and other voluntary contribution programs, the Trust provides all Marylanders – indeed anyone with a concern for the health of the Bay and its rivers – with ways to participate in grantmaking programs that support hundreds of environmental education and on-the-ground restoration projects annually, touching tens of thousands of schoolchildren and engaging volunteers in hundreds of communities across Maryland.

To support the increasing demand for our grant programs, but more importantly, to address the critical need to address the “stewardship gap” in the Bay restoration effort, we commit to:

- Increase to \$10 million by 2015 the amount we grant annually – more than double our current grantmaking.
- Engage at least 1 million people annually in Bay and local watershed restoration efforts through the hundreds of environmental education, restoration, or community engagement projects funded through our grant programs; and through the Trust’s voluntary contribution programs, including the *Treasure the Chesapeake* license plate, and income tax check-off programs.
- Launch a new Stewardship Communities Initiative to build and tell the stories of 100 exemplary stewardship communities across Maryland and the greater Bay watershed. These examples will show how communities, with funding and other support provided by the Trust and through contributions made by individuals across the Bay region, have developed common visions of a healthy, sustainable places – by a river, on the Bay, in a watershed – and moved decisively toward making those visions realities.

Mission

The mission of the Chesapeake Bay Trust is to promote increased public awareness and public participation in the restoration and protection of the Chesapeake Bay and its tributary rivers and streams.

Vision

We envision a near future in which the citizens and communities of Maryland and the broader Chesapeake Bay region will have achieved the levels of individual and community stewardship necessary to restore and protect the lands and waters of the Chesapeake Bay watershed.

Stewardship

By stewardship, we mean the active, deliberate, and responsible management – by individuals, households, businesses, and communities – of the natural world. Our work is focused on stewardship activities aimed at reducing adverse environmental impacts on the waters of the Chesapeake Bay region and improving habitat and living resources within the watershed.

We believe that stewardship is increased through improved knowledge (scientific and practical), a heightened sense of responsibility, and effective private and public actions informed by that knowledge and sense of responsibility. Only with a knowledgeable, motivated, and engaged citizenry will we achieve the levels of support necessary for increased public sector actions and the behavioral changes needed to lessen the environmental footprint of individuals, households, and communities on their local watersheds and the Bay and restore the health of these vital natural resources.

Principles

The Trust’s grantmaking strategies and general organizational philosophy are shaped by a series of principles. We look to these principles as basic touchstones for developing our grant programs, engaging new partners, communicating about our work, and building our organization as a whole.

Increasing Stewardship: A heightened ethic of individual and community stewardship is essential to the restoration and protection of the Chesapeake Bay and local rivers and streams. The Trust’s fundamental goal is to support locally-led efforts to cultivate and sustain sound stewardship of our lands and waters.

Connecting People with Place: The Trust is a place- and community-based grant maker. We invest in projects that reconnect individuals and communities with place and that renew an ethic and ethos of stewardship for local lands and waters.¹

Stewardship Communities: The Trust works to build stewardship communities. Stewardship communities are places where people have developed a vision of improved environmental and community health and a plan to achieve it; are developing the leadership and institutions needed

¹ Together with the broader Bay restoration community, the Trust takes the watershed as the key landscape level unit for understanding water quality impairments and for developing and implementing pollution control and restoration strategies. Over the next five years, the Trust will look to the implementation of the Chesapeake Bay Executive Order, the new goals and milestone framework of the Bay Program partnership, and the development of a Bay-wide Total Maximum Daily Load (TMDL) program as the broader planning and policy framework in terms of which we develop strategies for our grant programs. In its grant-making, the Trust will continue to support the restoration of local watersheds, capacity building for watershed and river organizations, and educational opportunities structured by “meaningful watershed experiences.” In the future, however, the Trust will focus more attention on the human dimensions and the community-context of watershed restoration work.

to sustain stewardship activities into the future; are implementing exemplary projects that involve community members and result in real on-the-ground and behavioral changes; and have compelling stories to tell and a desire to share them with others.

Civic Philanthropy: The Trust practices an innovative brand of civic philanthropy. Our grant programs are supported by tens of thousands of individuals who contribute annually through the *Treasure the Chesapeake* license plate, *Bay Fund* income tax check-off, and other donor programs. These programs enable the Trust to serve as a grassroots funder of grassroots efforts to restore the Bay.

Capacity Building: The Trust provides technical assistance and a “ladder” of grant programs designed to engage a wide range of organizations (from small, volunteer-based to large professional organizations) and to build the capacity of organizations and communities to implement well-designed, replicable, and sustainable restoration, education, and outreach projects and programs.

Diversity and Inclusion: The Trust supports organizations committed to bringing a broader and more ethnically and racially diverse set of organizations, communities, and leader into Bay and local watershed restoration and protection efforts. The success of these efforts will require increased outreach, capacity building, and, importantly, a willingness to listen to and understand the values and specific concerns of diverse communities.

Geographic Scope: The Trust funds projects throughout Maryland and across the broader Chesapeake Bay watershed.

Commitment to Science: The Trust uses the best available scientific research in the development of its restoration and water quality programs and seeks to advance restoration science through the implementation and evaluation of its programs. The Trust relies on the best available social science research in the development of the outreach and social components of its grant programs.

Innovation and Entrepreneurship: The Trust funds innovative approaches to building the technical, social, and organizational capital needed to advance the Bay restoration effort.

Partnering and Convening: The Trust believes that its mission is advanced and its resources leveraged and amplified by 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.

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

Performance and Evaluation: In the execution of its own operations and in the oversight of projects, the Trust will promote a culture of high performance informed by rigorous self-assessment and project, program, and organizational evaluation.

I. Strategic Priorities: Grant Programs and Special Initiatives

The Trust’s overarching goal is to increase stewardship of land and water resources in Maryland and the broader Chesapeake Bay watershed through grants and other activities that advance environmental education, on-the-ground restoration, and community engagement initiatives. By 2015, we will support this goal by doubling our grantmaking to \$10 million annually.

We will bring about two types of impacts. First, we will create immediate and measurable environmental benefits through demonstration-scale restoration projects and outreach and education programs that result in individual behavior changes. Second, and over the longer term, we will build the capacity of organizations, schools, and communities to bring about the broad-based, systemic changes needed to restore the health of the Bay and local watersheds.

A. Environmental Education

The recovery of the Chesapeake Bay – and the future health of our environment, economy, and communities – depends on an environmentally literate and engaged citizenry.

Goal: *Create educational opportunities that provide all students with the knowledge, skills, and motivation to become better stewards of the environment and the Bay.*

Objectives:

1. By 2015, support the establishment of comprehensive and sustainable environmental education programs in at least 50% of the school systems with in Maryland.
2. Work with partners to enable all students to have at least 3 Meaningful Watershed Educational Experiences (MWEEs) before graduation.
3. Provide assistance to schools and supporting organizations to advance green school planning and implementation efforts, with the goal of doubling the number of green schools in Maryland by 2015.²
4. By 2015, achieve a 1:1 (100%) match from federal, state, and/or private sources for environmental education grants.
5. Make at least 3 awards annually that build leadership and recognize excellence among teachers and students involved in environmental education.

² There are currently 267 schools (12%) certified as “Maryland Green Schools” via MAEOE, with another 100 coming on line this year. Doubling bring the number of schools to approximately 700, or 1/3 of all Maryland’s private and public schools.

Strategies:

1. Provide grants, assistance, and training and facilitate partnerships that support environmental education curriculum development, hands-on outdoor learning experiences and field trips, school greening initiatives, professional development opportunities for teachers, and assessments and evaluations of environmental education programs.
 - a. Target at least three school districts per year.
 - b. Provide direct assistance to at least 100 schools to advance green school planning and implementation efforts and support other broader scale (e.g., school district-wide) green school initiatives.
 - c. Expand grant-making and technical assistance to schools in underserved communities.
2. Collaborate with non-profit, state, and local school system leaders in Maryland to implement the proposed high school graduation requirement in environmental literacy.
3. Sustain and grow partnerships in support of environmental education programs.
4. Implement and raise public profile of the Trust's environmental education award and scholarship programs.
5. Use environmental education programs to support the development of Stewardship Communities Initiative.

Performance Measures:

First-order outcomes:

1. # of students and teachers engaged through Trust grant programs
2. # of students experiencing MWEEs
3. # of schools implementing comprehensive environmental education programs
4. # of school systems with sustainable environmental education programs
5. Increased number of diversity grants
6. Partners engaged, dollars leveraged, new funding source created/accessed

Second-order outcomes:

1. # of students with higher levels of environmental literacy

B. Habitat Restoration and Water Quality

The Trust's restoration programs fund demonstration-scale 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.

Goal: 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 demonstration-scale habitat restoration and/or water quality improvement projects per year to advance individual and community stewardship.
2. By 2012, enhance restoration grant programs to incorporate the best available research on maximizing the potential of demonstration-scale projects to expand the adoption or replication of targeted BMPs, restoration practices, or stewardship activities.
3. By 2015, achieve 1:1 (100%) match from federal, state, and/or private sources on restoration grants.
4. By 2015, the Trust will have helped to advance at least 3 innovative and cost-effective BMPs from the experimental stage to accepted practices within the regulatory, policy, and/or scientific framework of the Chesapeake Bay watershed.

Strategies:

1. Develop suite of grant programs that support watershed planning, project design, and implementation of habitat restoration and water quality improvement projects.
2. Promote context-based restoration by prioritizing projects identified in or consistent with watershed plans or other problem- and scale-appropriate plans (e.g., tree canopy assessment goals, community sustainability plans). By 2015, 100% of watershed organizations funded by the Trust will be working from watershed action plans, and 75% of the Trust's restoration funding will be allocated to projects identified in or consistent with watershed or other plans.
3. Expand the Trust's staff-level capacity to provide technical assistance in watershed planning, conceptual project design, and project implementation associated core restoration BMPs.
4. Sustain and develop new federal, state, and private partners in restoration activities. Develop 3 new partnerships by 2015.
5. Use restoration programs to support the development of Stewardship Communities Initiative.

Performance Measures:

First-order outcomes:

1. Achievement of first-order ecological outcomes (lbs of N and P reduced, linear feet of living shoreline, acres of wetland, sq. ft. of bio-retention, etc.)
2. # of watershed plans (and other comprehensive restoration planning tools) developed.
3. Dollars leveraged and new funding sources created or accessed.

Second-order outcomes:

1. Strengthened community-based support for protecting or restoring critical habitat or implementing water quality measures in key watersheds.
2. Additional local resources for implementing restoration practices, projects, and programs.
3. Improved technical and organizational capacity of grantees engaged in restoration work.
4. Adoption/diffusion of innovative approaches or techniques.

C. Community Engagement and Capacity Building

Community-led stewardship efforts increase public understanding of watershed challenges, build ownership of the local watersheds, engage more individuals and organizations into stewardship practices and projects, and expand the base of citizen support and community involvement necessary to advance broader Bay restoration and protection goals.

Goal: *Increase levels of community engagement necessary to restore local watersheds and the Chesapeake Bay.*

Objectives:

1. Increase public awareness and support for watershed restoration and protection projects by local community members and leaders.
2. Increase adoption of stewardship practices at the household and/or community level.
3. Increase capacity of select organizations to bring about community-level behavioral and institutional changes needed to improve the health of the Bay and local waters.
4. By 2015, achieve a 1:1 (100%) match from federal, state, and/or private sources for community engagement and capacity building grants.
5. By 2015, help to build and promote the accomplishments of 100 exemplary stewardship communities across Maryland and the greater Bay watershed through the grant-making and technical assistance provided by our environmental education, restoration, community engagement and capacity building programs; and our communications and outreach programs.

Strategies:

1. Enhance outreach and community engagement grant programs based on review of social scientific research on outreach and community engagement “best practices.”
2. Require the use of pre- and post-project survey tools to measure attitudinal and behavioral changes affected by Trust projects.
3. By 2015, assist 50 watershed or other community-based organizations throughout the Bay watershed to develop and implement strategic plans, governance policies, communications campaigns, and/or development plans.
4. Expand grantmaking 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.
 - a. Pilot innovative grant and outreach approaches aimed at more fully engaging communities not currently participating in Trust programs and broader Bay and local watershed restoration activities.
5. Sustain and grow partnerships in support of community engagement and capacity building programs.
6. Use outreach and community engagement programs to support the development of Stewardship Communities Initiative.

Performance Measures:

First-order outcomes:

1. # of volunteers engaged

2. # of organizations and communities impacted.
3. # of diversity grants
4. Funds leveraged and new funding sources created or accessed.

Second-order outcomes:

1. Strengthened community-based support for protecting or restoring critical habitat or implementing water quality measures in key watersheds.
1. Improved organizational and programmatic capacity of target organizations.
2. Increased public awareness and engagement, as measured by public opinion surveys and other tools.
3. Development of 100 stewardship communities.

D. Expertise, Training, and Evaluation

Goal: Develop and deliver scientific and technical information needed by our grantees and the broader Bay restoration community to advance the practice of individual and community stewardship.

Objectives:

1. Increase availability and use of information on best practices for increasing individual and community stewardship via environmental education, demonstration-scale restoration, and outreach and community engagement projects.
2. Increase opportunities for students, youth, and transitioning workers to develop careers related to Bay and watershed restoration.
3. Track and evaluate accomplishments of Trust programs and Trust-funded projects.
4. 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.

Strategies:

1. Provide training and technical assistance to grantees on effective environmental education approaches, restoration practices, and community engagement, communications, and capacity building strategies.
2. Initiate new workforce development initiative that provides training to youth and adults about emerging restoration and stormwater design and retrofit practices.
3. Continue summer internship program.
4. Partner with other funders and educators to advance evaluation methods to measure the impacts of environmental education programs.
5. Assess opportunities for Trust to actively promote "nitrogen footprint" reduction efforts at organizational and/or community level.
6. Implement new award program to recognize an exemplary restoration, education, or outreach project.
7. Initiate new research fellowship program to support research, training, and technical assistance efforts.

Performance Measures:

First-order metrics:

1. # of grantees provided with technical assistance.
2. # of training sessions conducted.
3. # of presentations at workshops and conferences.

Second-order metrics:

1. Increase efficiency and effectiveness of projects funded.
2. Green jobs created or sustained.

II. Strategic Priorities: Development and Communications

A. Development

Goal: Increase revenue base in order to meet the growing demand for funds from an expanding grantee community. By 2015, the Trust will make \$10 million in grants annually.

Objectives:

1. By 2015, increase voluntary contributions to the Trust by 100%
 - a. By 2015, double – to 750,000 – the number of Bay plates on the road³.
 - b. By 2015, increase the number of contributors to the income tax check off program by 20% over 2010 levels.
 - c. By 2013, establish a new public financing mechanism to support the Trust’s grantmaking mission.
2. By 2011, establish a new funding channel – via a field of interest fund program – that will allow donors to more effectively leverage their charitable contributions through the Trust’s rigorous grantmaking process and skilled grantmaking professionals. Grow and support this funding channel so it will represent 25% of the Trust’s revenue portfolio by 2015.
3. Expand restricted funding partnerships with public agencies and private foundations (Chesapeake Bay Funders Network and direct partnerships on grant programs), representing 25% of fund portfolio.

Strategies:

1. Develop and implement a comprehensive five-year development and marketing plan designed to grow and diversify revenue base, placing a premium on the funding sources that are most reliable and afford the Trust maximal autonomy. (See Communications section below.)

³ As of Dec. 1, 2007, there were 4.462,920 vehicles registered in Maryland (data from Analysis of the FY 2010 Maryland Executive Budget, 2009)

2. Dedicate significant resources toward increasing participation in the Trust's core voluntary contribution programs (Bay plates, income tax check off) through traditional, internet-based, partnership, and point-of-sale marketing efforts.⁴
3. Expand funding partnerships with public agencies (state and federal) and private foundations (e.g., Chesapeake Bay Funders Network), where those partnerships clearly advance the Trust's own core objectives and values and enable it to remain faithful to its own organizational processes.
4. Establish a Corporate Partnership Initiative.
5. Establish an Advisory Committee of current and former Board members to assist with the development and implementation of fundraising strategies.
6. Explore opportunities to create additional state-wide or regional voluntary contribution programs.
7. Assess opportunities to establish planned giving, major gift, and/or endowment programs that could engage larger donors in direct support of the Trust's work as a grant-maker for the Bay watershed.

Performance Measures:

1. Increased revenue and grant making
2. Increased #s of Bay plates and tax check off participants/contributions levels
3. #s of individuals registered in CBT database

B. Communications and Marketing

Goal: Implement communications strategies and marketing campaigns that support the achievement of programmatic goals, enable the meeting of aggressive new revenue goals, and promote the expansion of stewardship practices.

Objectives:

1. Expand grant and award program outreach efforts to ensure that all programs have diverse and well-qualified applicant pools.
2. 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 by publicizing the grants made by the Trust and highlighting the impacts of key organizations and projects funded by the Trust and its partners.
3. Increase participation in the Bay plate, income tax check-off, and other voluntary contribution programs of the Trust.

⁴ The Trust's mission as an environmental grant-maker for the Bay depends on a strong and growing base of annual contributors. Public opinion research conducted by the Trust in late 2008 indicated that 42% of Marylanders would consider contributing to the Trust, given its mission as "an organization that makes grants to restore and protect the Bay and local rivers and streams throughout the State." Similarly, 50% said they would be likely or somewhat likely to purchase of Bay plate based on the understanding that the \$20 fee for the plate was reinvested in local communities through the Trust's grant programs. An even larger percentage of Marylanders, 52%, said they would be inclined to donate to the Trust through the check-off program. Finally, 46% said they would consider donating a dollar a month to the Trust through their EZ Pass account, were that option available.

4. Increase public awareness of the exemplary individual and community stewardship efforts funded by the Trust in order to inform citizens and local leaders about stewardship activities that should be expanded and/or replicated in communities across Maryland and the Bay watershed.

Strategies:

1. Use enhanced electronic and print outreach materials, leverage existing and new networks and partnerships, and target specific organizations and communities in order to increase and diversify applicants for specific grant and award programs.
2. Develop and implement communications and marketing campaigns that increase public awareness of the Trust and differentiate it from other Bay organizations and State agencies.
 - a. Cultivate association between Bay plate and the Trust: By 2015, increase to 50% the number of Bay plate owners who know that plate purchase supports environmental education and on-the-ground restoration projects funded by the Trust.
 - b. Select and widely publicize grant programs and their impacts through website, press events, social networking, traditional media, and awards programs.
3. Conduct regular public opinion research to assess progress related to increasing public awareness of the Trust and its work, awareness of Bay and local restoration efforts, and levels of individual and community stewardship. Use information to:
 - a. Advance public outreach, marketing, and development efforts; and
 - b. Assist grantees in developing effective communications strategies; and
 - c. Inform broader Bay restoration community about public opinion trends.
4. Develop and execute integrated marketing campaigns for Bay plates, income tax check-off, and new development programs that allow the Trust to meet aggressive revenue goals.
5. Strengthen cross-departmental cooperation to ensure consistent messaging across programmatic areas (grants, marketing, partnership development, media outreach, etc.).
6. Develop communications resources (e.g., signage, survey data, tools and protocols, etc.) that can be leveraged internally and externally (with grantees, partners, etc.) to support both partner and Trust goals.

Performance Measures:

1. Ratio of applicants to awards; geographical distribution of awards; number of diversity awards.
2. Cost/response rates for traditional and web-based marketing and development programs (cost-per-acquisition).
3. Increased public understanding of the work and mission of the Trust.
4. Increased # of Bay plates; increased participation in income tax check-off program; increased participation in other voluntary contribution programs.
5. Increased public understanding of the range of individual and community stewardship activities needed to restore the Bay and local waters.

III. Strategic Priorities: Management and Governance

A. Management and Governance

Goal: *Build the Trust's staff and board capacity to ensure the highest standards of excellence in operations, management, and governance.*

Objectives:

1. Strengthen the Trust's high public reputation for operational efficiency, financial transparency and accountability, and mission-driven effectiveness.
2. Improve quality of services provided to grantee community.
3. Hire, retain, and advance a diverse and high-performing staff by developing a performance culture based on a shared understanding of organizational and individual goals and responsibilities.
4. Recruit and develop a diverse and high-performing Board by developing a performance culture based on a shared understanding of organizational and individual goals and responsibilities.

Strategies:

1. Implement an annual budget and work plan development process that engages staff and board in a timely and systematic organizational evaluation and planning process.
 - a. Introduce new three-year budgeting process.
2. Conduct annual assessments of internal financial, administration, and communications tools and implement upgrades needed to improve effectiveness and sustain growth.
3. Build capacity of staff and office to serve the grantee community with technical assistance and training, streamlined and user-friendly grantmaking processes, and regular engagement with grantee community to learn about changing needs.
4. Adaptively manage programs and work plan generally through continuing evaluation and assessment of programs and the use of cutting edge research in philanthropy, organizational development, and communications.
5. Provide management and staff training and professional development opportunities, competitive salaries and benefits, and employee satisfaction.
6. Strengthen and diversify Board membership, the range of experiences and expertise they bring to the organization.
7. Maintain a Board committee structure that provides policy guidance for and oversight of the operations of the Trust, including through ongoing assessment of progress on strategic plan and annual work plan.
8. Set clear expectations about roles and responsibilities of Board members and officers and provide continuing opportunities for development of skills, knowledge, and experience.

Performance Measures:

1. Individual staff performance in execution of annual work plans
2. Organizational performance in execution of overall annual work plan
3. Retention and advancement of employees

4. Progress toward diversity goals