

Clayoquot Biosphere Trust Vital Grants Evaluation Report

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Introduction

The Clayoquot Biosphere Trust (CBT) is a registered charity based on the west coast of British Columbia, Canada. Established in 2000, CBT is the only organization in Canada that is both a community foundation and a UNESCO biosphere. CBT is one of 1,800 community foundations worldwide implementing United Nations' goals to reduce poverty, end hunger, ensure quality education, and protect the environment. CBT also oversees the Clayoquot Sound Biosphere Region designation, one of Canada's 19 UNESCO biospheres, and sustainability is at the heart of everything they do.

Overall, CBT Grants promote the health of individuals, communities and ecosystems throughout the Clayoquot Sound Biosphere Region. Vital Grants were a test of high-impact, transformational grants with a focus on sustainability and partnerships. This stream of partnership funding was created to address regional priorities and complex challenges that influence sustainability in the Clayoquot Sound Biosphere Region. These larger grants (up to \$20,000) aimed to support meaningful longer-term collaboration between organizations, communities and cultures, and were required to include a minimum of two project partners.

The figure and table below display some of the basic information about Vital Grants.

Vital Grants by the Numbers



Years of Granting



Grants



Dollars Granted



Grant Recipients



Grants to Partnerships
Led by Non-Qualified
Donees

Vital Grant Recipients and Project Names

Vital Grant Recipient	Project Name
Ahousaht	Bedwell River Habitat Restoration and Enhancement
Carving on the Edge Festival	ł̓aʔuukʷiʔaṭḥ Family Learning Curriculum Development
Carving on the Edge Festival Society	Putting the culture in the hands of our children
Cedar Coast Field Station Society	Assessing Juvenile Chinook Salmon Survival
Tla-o-qui-aht First Nation	Tla-o-qui-aht Nation Community Safety Initiative
Tla-o-qui-aht First Nation	Reconciliation-in-Action: Increasing Tribal Parks Allies Engagement Through Outreach and Education
Alberni-Clayoquot Regional District	Advancing the CAR: Actioning Community Priorities around Food and Agriculture
Yuuluʔilʔath Government - Ucluelet First Nation	Æʔł̓“ich̓l̓EuuÅ, WildSafeBC Coordinator: Hitacu-Macoah
Yuuluʔilʔath Government - Ucluelet First Nation	Connecting Through Cabins 2019
Pacific Rim Hospice Society	Child and Youth Grief Support
Surfrider Foundation - Pacific Rim Chapter	2018 Remote Clean Up Series & Ahousaht Beach Clean Team
Raincoast Education Society	Raincoast Field School at Ucluelet Elementary School
Westcoat Community Resources Society	Strengthening a Strong Foundation Kliilth Pi-taap Taaqumths Men’s Group

Structure of this Report

This report begins with a brief description of the project and its purpose. It then goes on to describe the approach to the Vital Grants evaluation and the methods that were used. Following that the findings are shared, including both findings from the individual grantee conversations as well as the November 15th Community Conversation. Finally, the report shares next steps that CBT has committed to taking.

Description of this Evaluation Project

CBT allocated the 2022 Vital Grant budget to reach out to past grantees in reciprocity to see what work they still need to do and allocate it in that spirit. The goal was to continue supporting existing projects while learning from project leaders about how the granting process worked for them and how to make it more equitable.

CBT engaged a consultant (Trilby Smith) to support the staff team on this project. The consultant structured the project, conducted interviews and data analysis in partnership with CBT staff, and wrote the report.

From the grant reports it was clear that most grantees were able to achieve the objectives they set for their grant-funded projects. So, this evaluation was not focused on understanding the impact of the individual grant-funded projects. Instead, the purpose of this evaluation of Vital Grants was to understand the experience of grantees and to gather feedback and input in order to determine how to move forward with the granting stream. Questions of funding process, grant scale, accessibility, and overall impact were also examined. Grantees were very generous with their time and knowledge and the learning from this evaluation will inform CBT's grant planning process going forward.

Evaluation Approach/Methodology

This evaluation was completed in three stages:

- 1) *Document Review and Identification of Themes and Questions*

The project began with a review of all documentation associated with Vital Grants. This included:

- a) Scoping documents from the development of the grant stream
- b) All grant applications (both funded and unfunded)
- c) Committee application review minutes

d) Grant reports

From the review, the staff team and consultant developed key themes to explore in the interview questions.

2) *Interviews with Vital Grants Recipients*

Following the development of the key themes, an interview protocol was developed to guide the conversations with grantees (See Appendix A). All Vital Grants grantees were invited to participate in a zoom or in person conversation with at least one CBT staff member and the consultant¹. In total, 12 conversations took place over the months of August and September (grantees were also given the option to respond to the questions in writing, which one grantee did). The conversations were recorded, and the staff/consultant used an Interview Data Collection form (See Appendix B) to reflect on the interview and identify key themes immediately following each conversation.

Following the completion of all interviews, CBT staff and the consultant read through all the Interview Data Collection Forms, and then met to analyze the data, using the questions on the form to guide the conversation. From this data analysis, the team identified questions to explore further in the Community Conversation.

3) *Community Conversation*

The purpose of the Community Conversation was to share the findings to date of the evaluation, and to work with the group collectively to further analyze the data. This approach returns the data to those who own it and asks them to participate in further sense-making. Additionally, the approach supports dialogue across the community and can build support for the ways the findings are used to inform the work moving forward.

Invitations to the conversation were sent to all Vital Grants recipients (whether or not they had participated in the interviews) as well as some grant reviewers and grant recipients from other CBT grant streams. In total 12 participants joined the Community Conversation, which was held in person on November 15th. The conversation was structured as follows:

- a) Opening and Land Acknowledgement
- b) Purpose of the Session and Overview
- c) Introductions
- d) Presentation on Vital Grants (What have we learned so far?)

¹ One conversation took place with only the consultant and no CBT staff members due to scheduling issues.

- e) Sharing of parameters for conversation (what decisions have already been made)
- f) Small group conversation:
 - i) Based on what you've heard today, what do you think are the most important directions forward for Vital Grants?
 - ii) What more can the CBT do to identify regional priorities?
 - iii) What more can the CBT do to advance equity via Vital Grants?
- g) Closing and Lunch

Findings

The findings from this project are shared below in two sections: Individual Grantee Conversations and Community Conversation.

Individual Grantee Conversations

General Comments

Overall, the feedback on Vital Grants was very positive. The general comments that people made fell into three key areas:

- *Diversity of work funded*

Because Vital Grants aimed to address regional priorities, complex challenges and sustainability, the grants funded a huge diversity of work, from Indigenous language revitalization to juvenile Chinook salmon to youth grief counseling. The entry points into addressing important issues were varied and the grants supported both new work and the evolution of existing work in the region.

- *Partnerships*

Grantees valued the partnership aspect of the grants. Most interview participants reported that they were able to either establish new partnerships or deepen existing partnerships through Vital Grants, and that these partnerships were authentic (not “on paper” only). The partnership requirement enabled the bringing together of people and organizations with different skills sets. As one grantee said:

“The level of monetary support was extremely helpful in supporting partnerships and in deepening impact. While partnerships are incredibly important and valuable, they do take more work and capacity to foster and maintain. This grant helped us bring together various unique, yet related projects, that were separately funded and bring them under the umbrella of a common goal and vision.”

- *Flexibility*

Grantees valued CBT’s flexibility during the application process and throughout the life of the grants, as well as the process improvements that were made over time. Grantees who applied at the beginning of Vital Grants and later in the life of the grant stream noted that the process became easier over time as the application was streamlined and improvements were made to the online granting system. In addition, because this grant stream straddled COVID, grantees spoke of their appreciation for CBT being especially flexible and responsive to grantee needs during the pandemic.

Areas for Improvement

While overall feedback was generally positive there were of course areas identified for improvement. Some of these included:

- *Duration of grant*

As several grantees noted “a year is very short,” especially during the pandemic when you are trying to develop or deepen relationships with partners. Grantees expressed repeatedly that multi-year funding would be very welcome.

- *Support during the application process*

Many grantees expressed that they would have appreciated additional support from CBT during the application process. Examples of the kinds of support that people were seeking included flexibility in the application process (i.e., oral applications) or the opportunity to present applications in person to the review committee. Some grantees also shared their desire for a less structured process overall, where they could share information in a format that worked for them, or to engage with CBT staff throughout the application process as they were developing their idea.

- *Transparency and Inclusion in Grant Decision-Making*

The desire for increased transparency in the grant review and decision-making process was raised frequently during the conversations. People expressed the desire to know more about who was on the grant review committee and how the decisions were made. Some grantees did

not understand why certain grant applications had not been funded. Additionally, the idea of having youth participate in the decision-making processes was suggested by multiple people, and others suggested having elders participate in the process as well.

Equity

In each conversation, grantees were asked what CBT could do to support increased equity through its work. Below is some of the feedback that was shared:

- *Support for CBT's current direction on equity*

In general, the people who participated in the interviews were aware of and supportive of the work that CBT has already been doing to advance equity. During the conversations, the following was shared about the work that CBT is already doing:

- Identifying and changing granting practices that are barriers to potential applicants,
- Meeting the needs of community project leaders in ways that work for them, and
- Testing and formalizing new approaches as we learn and unlearn together.

Interview respondents were supportive of all these components of the work and emphasized that it is important for CBT to continue its convening and connecting work. It is appreciated when CBT makes training and other opportunities available to the whole community to advance equity work.

- *Core and Multi-year Funding*

In order to support the complexity of the work and the timelines needed to make systemic change, there were two ideas that were very present throughout the conversations. The first was core funding, and the second was multi-year funding. As one interviewee said regarding core funding, *“If people could just have funding to do the work they do.”* Core funding, often also called general operating dollars or unrestricted funding, is generally recognized in the philanthropic sector as a leading practice and is particularly central to trust-based philanthropy. This practice allows grantees to determine where the grant dollars are most needed within their organization.

“Funds that lack flexibility create a risk that grantees will not do the most important or most relevant work, but rather will do the work that they were funded to do, despite shifts or changes. When grantees have flexible, unrestricted support, they have the space to bring their full expertise—and their communities’ needs—into the work they do.” [Trust-based Philanthropy website]

As mentioned earlier in this report, *“a year is very short”* and most grantees spoke about the

benefits that multi-year funding would provide. When speaking about their long-term vision, one grantee shared *"To achieve the big dream we need a 15-year funding commitment."* While 15 years may not yet be a realistic timeframe for CBT to fund, there is ample evidence that multi-year funding can do the following:

- Support the stability of grantee organizations,
- Encourage risk taking, creativity, innovation, and emergent action instead of sticking to proposal outcomes that may become outdated, and
- Support grantees' long-term planning by allowing them to project resources and make strategic investments to meet emerging needs. [Trust-based Philanthropy website)

- *Increased Accessibility*

When speaking about equity, in addition to the suggestions above under Areas for Improvement, many grantees spoke about the importance of making the application process more accessible. This was seen as particularly important to support applicants who may not have applied for a grant before. One grantee shared the following, *"Decisions are made while the grant is being written - partnerships are developed during this period. Another option would be to have a less developed idea and use grant funding to develop it. This engages communities more deeply."*

Community Conversation

As mentioned above in the Methodology section, the Community Conversation provided an opportunity to dig more deeply into some of these findings. Presented below are the main themes of the conversations, organized by the questions asked during the conversation.

1. What are the most important directions forward for Vital Grants?

- Making the application process more accessible.
 - A two-stage application process with an initial shorter Letter of Intent followed by a full application for a smaller group of applicants.
 - making alternative options available such as oral/video applications
 - Additional support from CBT staff throughout the application process
 - Provide honoraria for the time spent to develop applications, particularly for youth, elders, and new grantees

- More inclusive decision-making process. Engage elders and youth, valuing both their experience and perspective.
- Increase flexibility and responsiveness in the use of funds.
 - Core funding
 - Organizational capacity building
 - “Stage grants” - giving grants for different phases of the work such as developing an idea and expanding a project

2. What more can the CBT do to identify regional priorities?

- Engage youth (at a time that works for them, i.e., during school)
- Continue to engage multiple, diverse and different audiences through method such as:
 - Pop-up consultations
 - Community Events
 - Visiting different communities throughout the region
- Lift up and highlight work that is taking place in the region

3. What more can the CBT do to advance equity via Vital Grants?

Building on the ideas shared during the Individual Grantee Conversations, many of the same concepts were further developed and underscored during the Community Conversation.

- Support Partnerships.
 - Focus the LOI stage on partnership building
 - Help to connect partners doing similar or complementary work
- Build capacity and provide financial support for grant writing
 - provide financial support for a grant writer
 - provide honoraria for grant development meetings
 - dedicate resources to fund grant writing in the nations
- Provide Multi-year funding

- don't add new requirements in subsequent years of multi-year funding
- allow projects to evolve naturally
- build in flexibility
- provide check-ins and support regularly (i.e., quarterly or annually)
- Engage with new people and organizations
 - bring in and connect with different people within an organization - reach beyond the leadership team
 - ensure equitable distribution of funding throughout the region
 - "go to them" - travel throughout the region, don't just hold centralized events
- Consolidate and share resources
 - Create a donor catalogue
 - Facilitate a directory for non-profits
 - Create a JEDI (Justice, Equity, Diversity and Inclusion) Manual for grantees

Conclusion and Next Steps

Overall, this Vital Grants evaluation process provided an important engagement opportunity for CBT with the community. CBT staff, grantees and community members stated their appreciation for these conversations, and many noted the centrality of relationships to all this work. CBT also received much praise for the way it approaches its work and the thoughtfulness that has gone into its Equity Pathway. And there is more work to be done. As one CBT staff member said in the debrief conversation, *"We've come a long way but there is still a long way to go."*

CBT staff are absorbing everything that was learned from this evaluation and have committed to some clear next steps. There are also some ideas that will take more time to implement.

Below are some of the steps that CBT plans to take in the **immediate term** (for the next Vital Grant cycle [2023]):

- Move to a Two-Stage Application Process
 - This will involve an initial LOI (Letter of Intent) and then a smaller group of applicants being invited to submit a full proposal
- Provide Funding to Applicants for Full Application Development

- All applicants will receive the same amount, and the funding can be applied to staff time, honoraria and food for gatherings held to develop the application, or other uses at the applicants' discretion
- Increase Transparency and Inclusiveness of Grant Evaluation Process
 - Add youth and elders to review committee
 - Invite past Vital Grants recipients onto the review committee
 - Share evaluation criteria with grantees before applications are submitted
 - Share additional information with applicants on how the grant evaluation process works
 - Share more details about the grant review committee (maintain anonymity, but share demographics and other descriptive information)
- Provide Additional CBT staff support for applicants
 - Staff who are not involved with the grant review committee will be available to provide support to applicants
- Expanding reach
 - CBT staff will work to use tools such as Facebook live, travel to regional communities, non-profit socials and open houses
- Test Multi-year Funding
 - One of the 2023 applicants will receive multi-year funding, and this process will be evaluated so that CBT can learn from it as they determine how to move forward with multi-year funding overall for the organization

The following are ideas that CBT plans to **explore in the future** but won't be implemented for the upcoming grant cycle:

- Core funding
 - It is not feasible for CBT to provide core funding grants at this time, but they plan to conduct further research to understand how this could be possible in the future
- Increase Engagement in the Identification of Regional Priorities
 - Engagement can come through Vital Signs, which will be happening in 2023 with the data becoming available for the following application cycle

- Develop a donor catalogue to highlight projects in the region that need funding
 - This project is beyond the current capacity of CBT

APPENDIX A

Clayoquot Biosphere Trust Vital Grants Review Interview Guide

BEFORE Interview Begins:

Complete **Interview Data Collection Form** with Name(s) and Organization(s) of those participating, names of interviewers, and date of interview.

AT BEGINNING of Interview:

(CBT Staff Member) Welcome and brief reminder of purpose of interview.

- As we said in our email, Vital Grants were created to address regional priorities and complex challenges that influence sustainability in the Clayoquot Sound Biosphere Region. These larger grants aimed to support meaningful longer-term collaboration between organizations, communities, and cultures.
- The purpose of these conversations is to help us continue learning how CBT can best serve the region. This is an opportunity for US to reflect on what we can do differently. We really appreciate your generosity in helping us to learn.
- We will be recording these conversations, only to help us be more present during the meeting, and to enable us to go back and listen to what you said more than once. We will not be sharing the recordings beyond CBT, and we will not be attributing anything you say to you by name. Is it ok with you if we record?
- **BEGIN RECORDING**
- Let's do a brief round of introductions, name, organization and role as it relates to Vital Grants.

Ok, let's get started.

1. Tell us a little bit about the current status of the work that was funded through the Vital Grant. Has the work continued or evolved? What additional changes have you seen since you submitted your grant report?
If the work hasn't continued, can you tell us a little about why not? We really want to learn about things that have gone well, and also about challenges you have had (sometimes that's where the best learning comes from!)
2. Vital Grants were intended to support meaningful collaboration between organizations, communities and cultures. Did this grant funding enable new or deepened partnerships for you? If yes, can you tell us a little bit about how the funding helped you do this?
If your partnership work didn't go as planned, what are some of the reasons why not?
3. How did Vital Grants support your work on regional priorities and/or complex challenges that influence sustainability in the Clayoquot Sound Biosphere Region?

4. From your perspective, what was different about this grant (from other Clayoquot Biosphere Trust [CBT] grants or other grants in general)? Was there anything unique that it helped you to do that other grants have not?

5. In general, we learned from the grant reports that this granting stream did contribute to the impacts we intended when we developed the granting stream.
(intended impacts: increased collaboration among partners, addressing regional priorities and/or complex challenges related to sustainability).
 - a. Can you share your thoughts on what parts of the granting structure and granting process supported the achievement of your goals?
 - b. And what parts of the granting structure and process made your progress more difficult, or what could have been made easier along the way?

6. Aside from, or in addition to direct grant funding, what other opportunities do you see for CBT to support organizations that are addressing regional priorities and complex challenges?

7. As you may know, CBT has been on a journey to become a more equity-driven organization. We are working on :
 - a. Identifying and changing granting practices that are barriers to potential applicants,
 - b. Meeting the needs of community project leaders in ways that work for them, and
 - c. Testing and formalizing new approaches as we learn and unlearn together.

—> Reflecting on the work you did funded by Vital Grants, can you describe how your project influenced health and ecological equity? (or, can you tell us a bit about if or how your project influenced equity in the region?)

—> What else do you think CBT could do to support increased equity through its work?

8. Would you be interested in participating in a collective conversation with other grantees and community members in the next few months to continue the learning together about how CBT can continue to evolve its work to best support the community? What other ways might you like to be involved moving forward?

9. Is there anything else you'd like to tell us? Do you have any questions for us?

Thank yous and confirm payment of honoraria and how to follow up on reciprocity grants.

AFTER Interview:

- **Stop recording**
- Save recording to Teams folder
- Complete **Interview Data Collection Form** as close to the end of the conversation as possible and save to Teams folder

APPENDIX B
CBT Vital Grants
Interview Data Collection Form

Date	
Name of Organization(s)	
Names of Interviewees	
Names of Interviewers	

Your Name:
Your Reflections:

1. From what you heard in the interview, what were the unique ways that Vital Grants supported the work of this grantee and their partners?

2. From what you heard in the interview, what were some of the ways that the Vital Grants process and structure presented challenges or could have been improved?

3. What did you hear about how CBT could support increased equity?

4. What was something new you learned in this conversation, or something that gave you some new perspective?

5. Any other notes?