



Case Study

Clayoquot Biosphere Trust



Introduction

This case study, published by Global Fund for Community Foundations, is one in an occasional series highlighting community foundations that have been formed with substantial revenue from corporate or government investors to explore how communities harness these assets for the greatest collective good. Data for this study was compiled through interviews with Tammy Dorward, Board Co-Chair, Rebecca Hurwitz, Executive Director, and Laura Loucks, Research Coordinator, and review of the CBT's website and publications.

Clayoquot Biosphere Trust at a glance:

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|----------------------------------|--|
| Communities: | Ahousaht First Nation, Alberni-Clayoquot Regional District, District of Tofino, District of Ucluelet, Hesquiaht First Nation, Tla-o-qui-aht First Nations, Toquaht Nation, Yuułu?if?athh Government |
| Region: | Clayoquot Sound, Vancouver Island, BC, Canada |
| Mission: | The community of the Clayoquot Sound UNESCO Biosphere Region will live sustainably in a healthy ecosystem, with a diversified economy and strong, vibrant and united cultures while embracing the Nuu-chah-nulth First Nations 'living' philosophies of <i>lisaak</i> (living respectfully), <i>Owa' aak qin teechmis</i> (life in the balance), and <i>Hishuk ish ts'awalk</i> (everything is one and interconnected). The mission of the Clayoquot Biosphere Trust is to assist the Clayoquot Sound UNESCO Biosphere Region Community to achieve its vision by providing funding and logistical support for research, education, and training initiatives that promote conservation and sustainable development. |
| Original Endowment | |
| Source(s): | Government of Canada |
| First Year of Operations: | |
| | 2000 |
| Grantmaking: | CA\$235,000 in 2016 – food security 5%, education & youth 43%, research & environment 25%, community development 11%, culture & events 16% |

History & Governance

The Clayoquot Biosphere Trust, in Clayoquot Sound, Vancouver Island, is a unique entity in Canada: it is the only community foundation created to manage the financial, cultural, and natural resources of a UNESCO biosphere reserve. The Nuu-chah-nulth First Nations philosophy *Hishuk ish ts'awalk* – ‘everything is one’ – is the guiding principle for the biosphere, and the CBT, communities, and other organizations that care for the biosphere work in a spirit of honoring ‘interconnections between ourselves and the ecosystems that we live within.’¹

The CBT formed in response to decades of intensifying conflict over natural resources and aboriginal rights in Clayoquot Sound. Fishing and timber stocks, upon which generations of Nuu-chah-nulth First Nations and some non-Indigenous communities have relied, had been diminishing steadily, causing profound and deleterious effects on many people’s cultural identity, spiritual practices, and sense of well-being. Tensions ultimately spiraled into violence and despair.

In the 1990s, a group of community leaders sought new approaches to bring peace and discovered the UNESCO biosphere reserve program. Board Co-Chair Tammy Doward, representative for the Tla-o-qui-aht First Nations, recalled that ‘it all came out of protecting the Sound and preventing any further logging on *Wah-nah-jus Hilth-hoo-is* mountain . . . The (Tla-o-qui-aht) community invited loggers to put down their chainsaws and share a meal,’ and that was the catalyst for a discussion about sustainable development and the biosphere reserve designation.

The biosphere reserve is a model for managing natural resources that protects key habitats, recognizes aboriginal title and rights, and stimulates a healthy, sustainable local economy. Biospheres are intended as interdisciplinary study sites for understanding the relationship between social and ecological systems.² Clayoquot Sound leaders believed the model could help heal painful divisions, rejuvenate the economy, and honor the ecological, cultural, and spiritual importance of the area.

With the support of First Nations, other communities, and local and regional governments, the region was designated a UNESCO Biosphere Reserve in 2000. That same year, the Canadian government allocated a CA\$12 million endowment for the region. Amidst evolving treaty negotiations between First Nations and the Canadian government, eight First Nations and non-Indigenous communities created the Clayoquot Biosphere Trust to manage this endowment. According to Executive Director Rebecca Hurwitz, ‘It’s an obvious fit to be both a biosphere reserve and a community foundation because both (models) are about people working together to thrive in healthy places.’

A ten-member board oversees the CBT’s strategic development and financial management. Each of the eight communities (five Nuu-chah-nulth communities and three non-Indigenous communities) in the biosphere region select a board member and an alternate. Two others are at-large positions, and four non-voting advisers represent provincial and federal government. The board has two co-chairs, one representing a Nuu-chah-nulth community and one representing a non-Indigenous community.

Indigenous representation is a recognition of First Nations’ fundamental and historical relationship to the Sound and is key to the success of the organization. Tammy said

1 <http://clayoquotbiosphere.org/what-we-do/communities/>

2 <http://www.unesco.org/new/en/natural-sciences/environment/ecological-sciences/biosphere-reserves/>

that being an Indigenous person and sitting at the board table creates the opportunity to 'share and celebrate, to make solutions work . . . Any future projects need to have the inclusion of Indigenous people built into the governance structure.' This approach conveys respect for Indigenous communities, and 'helps the board and organizations understand that this is how we work in the region,' Tammy explained.

The trust encourages an open, inclusive process in selecting representatives, and usually communities make appointments or call for volunteers. As ambassadors who maintain the organization's visibility and credibility, it is preferred that board members live in the community they represent. (While this is important from an operations perspective, culturally the association between 'home' and a person's residence is less salient: for Nuu-chah-nulth home is always one's original territory regardless of where a person may reside at any given time.) For some in outlying areas, distance and travel time to meetings can be barriers to board participation, and many communities are active with a variety of projects, so it can sometimes be difficult to juggle multiple priorities. The Executive Director and other staff help maintain contact with communities to encourage their continued involvement, and the board has on-going conversations about participation so members can support each other in their leadership commitments.

Grant Programs

The CBT makes grants and provides technical support for community development, conservation research, and youth leadership development. One of the organization's first programs was a scholarship fund, an especially appropriate investment given CBT's educational mission as a UNESCO biosphere reserve. Soon after, a general community projects fund was created. Grants from this fund are awarded in four areas: research and environment, youth and education, community development, and culture and events. Advisory committees, made up of 12–15 volunteers from throughout the region, review proposals in each of these areas and make one-year grants of up to \$8,000. The committees also have discretionary funds which they may use to implement their own projects, but typically they use this pool for making grants on a case-by-case basis.

In the last few years, the CBT has created two additional grant programs, the Neighborhood Small Grants program and the Biosphere Research Award, in response to community requests and grantee feedback. Neighborhood Small Grants are open to all residents, but are particularly important for First Nations communities that are not established as non-profit entities under the rules of the Canadian government. Residents of these communities can apply as individuals for small grants of up to \$500 to support a project that engages neighbors, shares skills and knowledge, builds local community capacity, respects and celebrates diversity, and builds community ownership and pride. A similarly designed advisory committee approves grants in this program.

Biosphere research grants were originally made exclusively through the general community projects program, but grantees reported that the amount was insufficient to support robust scientific research. In 2014 the Biosphere Research Award was created to fund conservation research to protect key species and ecosystems with grants of up to \$20,000. Research Coordinator Laura Loucks said the CBT team is now 'expanding (the grant program) to be inclusive of traditional ecological knowledge.'

Through these funds, the CBT has supported projects ranging from free screenwriting workshops and the Maaqtusiis Gymnasium blessing to research on the seasonal diet of Stellar and California sea lions in Clayoquot Sound. In 2015, the CBT invested more than \$28,000 in arts and culture funding, including support for a cultural expo and Nuu-chah-nulth audio lessons. Since 2010, the CBT's Eat West Coast initiative has invested over \$100,000 to support grants for food security and food system projects in the region.

Practicing 'Collective Investment'

Given that the endowment was intended as a stable asset that could support the long-term growth of the CBT, stakeholders agreed in principle with a collective investment approach: funds would be pooled and used for maximum benefit of the whole rather than simply allocating a portion of the budget to each community. However, in the early years putting collective investment into practice was more complicated. The board structure, which requires that members be selected from all of the eight communities, ensures broad representation, but initially it also had the unintended effect of promoting factionalization. Board members tended to see themselves first and foremost as advocates for their individual communities rather a decision-making team charged with promoting the well-being of all people and organizations in the region. Communities themselves had the same understanding of the board's role.

To overcome this misperception, the CBT created the grantmaking advisory committees that oversee most of the organization's funds. This served not only to take the pressure off individual board members over grant allocations to their community, but also to expand the number and types of organizations and projects that the CBT could support.

In the process of developing this model, a common debate about 'good development' surfaced. Board members who felt the CBT should focus on short-term, local needs were often at odds with those who wanted the institution to take a longer-term, more holistic approach. Lengthy and sometimes heated discussions over procedures and operational issues reflected the complexity of the endeavor and the uncertainty of a new model.

However, the CBT transcended these obstacles by using multiple tactics to build cohesion with communities and among leaders. Grants that served diverse groups and purposes connected people that might not otherwise have worked together, and the CBT invested time and money in local festivals and public outreach. These efforts provided tangible evidence that the CBT was a true community resource for the benefit of all, and the institution started to gain wider acceptance.³ As public trust increased and leaders continued their discussions about the CBT's purpose and mission, the board has worked through most of the major points of contention and built an effective decision-making team. According to Tammy, board members 'each bring strengths, and that's why we're there. When it comes time to make decisions, we always come back to the core mission and vision statement. Big differences of opinion are (now) few and far between.'

3 (Francis, G., Mendis-Millard, S., Reed, M. and George, C., 2010), <http://clayoquotbiosphere.org/wp-content/uploads/2011/05/CSBR-Periodic-Review-2010.pdf>

The Evolution of Grantmaking

Just as the organization has evolved its practices around collective investment, so has it begun to experiment with new grantmaking strategies. For most of its history, the CBT has solicited applications and approved funds for grantees, a conventional approach that does not involve grantees in the design process and does not require much time or effort from either party for collaboration. In 2015 an opportunity arose for the CBT to try a 'proactive' model to address complex problems in youth education. The 2015 Vital Signs report, a biennial study the CBT produces to measure quality of life indicators and ecosystem health in Clayoquot Sound, revealed that graduation rates for First Nations students were below the regional average, and that 'there were a lot of complex factors impacting students' success,' according to Rebecca. For example, principals reported that students needed more support making the transition from elementary school to high school. At the same time, the CBT team discovered data collection methods did not take into account family mobility, so some of the information was not reliable out of context.

Recognizing not only what the data indicated but the challenges of collecting it, the CBT team decided to invite some previous grantees and other partners to the table to discuss how to collaborate on a solution that would involve many sectors, communities, and institutions and require several years to measure progress. These conversations led to a new framework for grantmaking through which the CBT and select partners come together to set goals and design strategies for achieving them. Once a project or initiative has been designed, the CBT team plays a much more hands-on role in supporting implementation.

The Connecting Students with Wildlife program, a collaboration between program co-founders Bob Hansen and Keltie Minton, the Raincoast Education Society, and the CBT, was the first project borne of this proactive grantmaking model. In the 2015–16 school year, 108 students from five schools learned to identify and track wildlife safely, and they gathered with wildlife ecologists to share and learn in the first regional wildlife science symposium. Grantee partners coordinated on the school curriculum and field research, and the CBT organized the symposium.

According to Rebecca, the new model presented a learning curve both for the CBT team and grantees. All parties discovered how collaboration, rather than a transaction-based relationship, uncovers assumptions about responsibility and accountability and ultimately changes the power dynamic. Grantees and the CBT had to negotiate new roles, which required giving up control in some areas and taking more in others, and to clarify expectations around iterative program design and on-going feedback loops.

Now the challenge is to evaluate results and measure long-term success. This is another area where collaboration, though more complicated than a top-down evaluation approach, will produce a more holistic view of whether and how change is happening. Because they are collaborating, all parties can define success from a variety of perspectives and create indicators and benchmarks that reflect the multiple areas in which the project is trying to affect change.

The first attempt at proactive grantmaking has proven that the new model can help the institution do more, especially in areas that are too complex for any one grantee to tackle alone, such as residential school impacts, food insecurity, and ecological restoration. Rebecca explained that the organization is exploring how to revamp its program to promote more partnership grants. The CBT team is starting conversations

with stakeholders in established networks first and will draw from that experience to determine how to build new multi-stakeholder partnerships.

Other Programs & Partnerships

Because one of the main purposes of a biosphere reserve is to support learning, research and education initiatives are a cornerstone of CBT programming. Youth engagement is an area of special focus: in addition to student scholarships, the CBT makes small grants to young people who want to design and implement their own school or community projects. It also sends one youth delegate to participate in the national Students on Ice program, an expedition to the Arctic where students join scientists, artists, elders, CEOs, authors, and others to experience the Arctic ecosystem and learn from Indigenous leaders about the 'dynamics of climate change, traditional knowledge, scientific research, policy and other important Arctic and global topics.'⁴

Research is conducted by people of all ages, from community members to university scientists to elders. Three Nuu-chah-nulth philosophies – Hishuk ish ts'awalk (everything is one and interconnected), Iisaak (living respectfully), and Qwa' aak qin teechmis (life in the balance) – that guide the CBT's vision also form the basis for research.⁵ In Tammy's experience, researchers from outside the community are 'respectful in knowing how to find, approach and build relationships with the local people in the development of the research project or work,' which she attributes to networking among different groups and discussions of a variety of community issues and concerns. She believes that old attitudes that indigenous knowledge must be 'validated' by Western science may be falling away and that a research approach guided by Indigenous communities is starting to gain momentum.

Because research is inclusive and grounded in First Nations' world view of the interconnected nature of the Clayoquot Sound, it not only generates knowledge but builds tremendous social capital. When people feel connected to the place and to each other, and they feel a sense of shared responsibility for the region's long-term health and well-being. The relationships that form in this process support consensus-based decision-making, and the data helps drive strategic investments for sustainable community development and ecosystem conservation. One product of this research effort is a series of CBT-produced publications (Vital Signs, Living Wage 2015, and the Food Action Plan, among others) that inform conversations about policy and long-term planning among residents, municipal and First Nations leaders, and the general public.

Beyond the data it provides to support planning, the CBT is developing a reputation as a trusted partner and convener. With its presence in all eight communities and its track record of community-building, the CBT is able to bring people together for a variety of purposes. One purpose for convening is to define the organization's priorities in support of regional development goals. These gatherings help shape programs, investment priorities, and other operational objectives for the CBT, and they maximize opportunities to build bridges across cultures, communities, and institutions⁶.

4 <http://clayoquotbiosphere.org/core-priorities/youth-the-biosphere/>

5 Specific research protocols vary among nations and organizations in the region, but all adhere to Nuu-chah-nulth guiding philosophies.

6 Clayoquot Biosphere Trust, 2017

Financial Sustainability

One of the challenges for many foundations endowed with one funding source is creating other revenue streams. The CBT is beginning to diversify with four small funds, such as the Clayoquot Sound Wild Salmon Fund, which will help support the cross-regional research on salmon habitat, and the Biosphere Research Fund, started by a local surf board designer. Rebecca said the organization plans to establish more donor-advised funds that address needs identified in the Vital Signs report and that can support individual non-profits in the area.

Attracting more small donors is another goal. The CBT has set up online giving through its website, and the team is learning how best to engage individual donors. Rebecca stressed that individual contributions are important to building a sense of community ownership. These may take the form of donations directly to the CBT or matching funds communities contribute as part of their project's budget.⁷

Over the long-term the organization's goal is to cultivate diverse funding streams to support the endowment. One such effort toward this end is a capital campaign to raise funds to build a biosphere center that will promote the organization's mission and support its financial sustainability. The center will be 'a welcoming place and a community space – where residents, visitors and researchers feel equally comfortable, and where scientists and storytellers can share their valuable knowledge and teachings.'⁸ Most uses will be free for community members and visitors: people will be able to hold meetings, learn about events and programs in the region, or access the CBT library and archive, among other activities. To offset costs, the CBT team may rent some office space to local organizations and make the facility available for private events.

Looking to the Future

For the next few years, creation of a biosphere center will be a major goal, but other program areas will be prioritized as well. The 2017–19 CBT business plan outlines strategies and objectives that will support expansion for some important projects that have proven successful in the pilot stage. Among these is Connecting Students to Wildlife and the Soundscape Project, which collects monthly sound recordings to create a 'composite soundscape' of a 24-hour period to identify and track species that may have moved from their original habitat or have not been spotted by observation and visual monitoring.

Following on the work of the Truth and Reconciliation Commission of Canada and coinciding with the 150th anniversary of Confederation, the CBT and other philanthropic organizations signed a Declaration of Action in 2016 committing 'to move forward in an atmosphere of understanding, dignity and respect towards the shared goal of reconciliation.'⁹ The CBT will act on this commitment through a focus on healing and

⁷ While matching funds are encouraged, there is no hard and fast rule. Rebecca explained that sometimes it is appropriate for CBT to provide all the financial support for a particular project: 'In some cases CBT is the proof-of-concept funder to help organizations leverage funding from other groups later.'

⁸ <http://clayoquotbiosphere.org/core-priorities/the-biosphere-centre/>

⁹ http://clayoquotbiosphere.org/wp-content/uploads/2011/02/CBT_Business_Plan_2017-2019-final-1.pdf

reconciliation, furthering the mission of the organization and strengthening the work it is already doing in food security. Ensuring access to healthy, locally sourced food is a goal that supports others such as improving ecosystem health, honoring cultural practices and traditions, expanding education, and promoting a sustainable economy, so the impacts will be evident in other program areas as well. The CBT will continue facilitating Eat West Coast and will engage with remote First Nations communities to strengthen partnerships and support.

Key Lessons

As the CBT approaches twenty years of grant-making, community development, and capacity-building, the CBT staff, board, communities, and other stakeholders have rich experience from which to draw as they plan the future. According to Rebecca, the team has learned some key lessons, which have laid a strong foundation for the organization and position it for continued growth:

- **Involve all communities from the beginning:** All eight communities signed the nomination document to apply for the UNESCO biosphere reserve designation, which established the commitment to long-term collaboration.
- **Connect with networks and learn from others:** In 2012 the CBT joined the Community Foundations of Canada and benefitted from other organizations' support and knowledge. 'Prior to that we established our own granting programs and guidelines, learning some lessons the hard way,' Rebecca remarked.
- **Trust in the decision-making of local advisory committees:** The CBT grant advisory committees bring invaluable local knowledge, networks, experience, and historical perspective that enrich the CBT grantmaking process. The committees also play a key role in connecting grantees to others that can champion their issues or share knowledge. All of this contributes greatly to grant program's success.

Of course, all communities are unique, and local context is important. In reflecting on the CBT's journey, Tammy emphasized that communities must determine what is right for their region and that sharing stories is the best way to learn.



Global Fund for Community Foundations works with individual community foundations and other local grantmakers and their networks, particularly in the Global South and the emerging economies of Central and Eastern Europe. Through small grants, technical support, and networking, GFCF helps local institutions to strengthen and grow so that they can fulfill their potential as vehicles for local development and as part of the infrastructure for sustainable development, poverty alleviation, and citizen participation.

About the Author

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