



Environmental Initiatives Program Application Guide Projects Between \$5,000 and \$20,000

INTRODUCTION

Columbia Basin Trust (CBT) thanks you for your interest in the Environmental Initiatives Program. This application guide contains information you will need to develop and submit an application for funding consideration under the terms of CBT's Environmental Initiatives Program (EIP). Please read this document completely and refer to it when filling out the accompanying Application Form.

The EIP focuses on providing funding for community-initiated and community-supported project applications. This program has provided nearly \$3 million in funding over the past five years for environmental conservation, restoration, stewardship and education projects across the Basin. CBT is looking to residents and groups in the Columbia Basin for innovative projects that will help to maintain or enhance the environmental condition in and around their communities.

CBT Staff, as well as *Stewardship Advisors* are available to provide technical assistance during project and proposal development stage (contact information within).

Application Submission Checklist

- Everyone involved in putting together the application has read and understood the requirements.
- The application clearly identifies the proponent and the project.
- All information is complete, accurate and logical.
- The information provided in the application addresses all relevant selection criteria.
- Project budget balances.
- Letters of support are included with the application form (signed hard copies; four maximum).
- The application has been completed and submitted in time to meet the submission deadline (email and hard copy).

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WHAT TYPES OF PROJECTS DOES THIS PROGRAM FUND?

The Environmental Initiatives Program provides funding to community-initiated and community-supported environmental projects in the Columbia Basin which:

- Increase Basin residents involvement in addressing local environmental issues and/or
- Increase awareness and understanding of ecosystems to reduce present and future human impacts.

The scope of this program is to support projects which promote one or more of the following program priorities:

- Community initiated and supported ecosystem conservation, restoration and/or stewardship (land, water, air);
- Incorporation of ecological/environmental priorities into planning processes and other activities of local decision-makers;
- Environmental public education and awareness through community involvement and local empowerment; or
- Understanding of Columbia Basin ecosystems and environmental issues to school-aged youth throughout the Basin.

The following biological priorities in the Columbia Basin region will be considered in project selection:

- Low elevation areas
- Riparian areas
- Grassland ecosystems
- Complex wetland ecosystems
- Endangered or listed species and their associated habitat (for information on endangered and listed species in British Columbia <http://www.env.gov.bc.ca/atrisk/toolintro.html>)

CBT will consider funding projects that also address threats to the identified biological priorities such as:

- Climate change and
- Rural and urban development pressure.

The following environmental educational approaches will also be given priority in project selection:

- Physical (e.g., hands on) and/or emotional connection to nature to increase awareness and understanding;
- Identification and removal of barriers to motivate appropriate choices and behaviors for sustainable living; and
- Link to high-profile community-based environmental issue.

The following specific thematic areas have been recognized by the residents of the Basin as priorities and as such are eligible for funding:

- Water and watershed management
- Waste management and waste reduction
- Energy conservation
- Air quality

While CBT understands the importance to Basin residents of the following areas they are not eligible for funding this year under the EIP:

- Stand alone monitoring projects;
- Stand alone planning projects; and
- Projects that are requesting funds to be used specifically to advocate for outcomes that are not broadly supported by local residents.
- Projects that relieve any level of government from their obligations to the Basin.

AM I ELIGIBLE TO APPLY TO THIS PROGRAM?

Target Audience

The target audience for this program includes all residents (individuals, community groups, organizations and youth) of CBT area. See Columbia Basin map for the boundaries of CBT area: <http://www.cbt.org/map>.

Proposals from provincial, national or international organizations will be considered provided the applicant can demonstrate a significant and meaningful partnership arrangement with a Basin community and/or organization.

Target area

Only those proposals targeting EIP eligible activities within CBT's area will be considered.

Important considerations for restoration activities on private land:

- a) relative benefits to public and private interests must be reflected in the balance of private and public (e.g. CBT) contributions to the project (dollars, in-kind, and volunteer labour);
- b) due to the possibility of associated legal and liability issues, landowners may be required to enter into legal agreements to ensure the long-term maintenance and effectiveness of restoration works. The type of agreement will depend upon the scope of the project.
- c) Conservation, stewardship and education-focused proposals involving private land are eligible, given proper landowner consent.

Target activities

This program targets environmental projects that strive to achieve a balance between biological and educational priorities and community participation/support.

Available funding

CBT has approximately \$450,000 available for this program. The maximum allowable funding for any one project will be \$20,000. Funding through this program is available for one year only.

Multiple submissions

Multiple submissions are acceptable, keeping in mind the following evaluation considerations:

- if submitting twice for different components of one project (i.e. education and restoration) – the total maximum funding (\$20,000) for one project may be considered;
- if submitting for multiple projects (same applicant) – equitable distribution of funding among various applicants and regions will be considered.

Multi-year projects

These are projects that intend to span over multiple years to fulfill goals/objectives. Submissions for multi-year projects should provide realistic sustainability plans for the project beyond CBT's one year funding contribution. Proposals may be submitted in subsequent years, but continued funding is not guaranteed. Subsequent applications should include evidence of past progress on intended outcomes and show incorporation of past experience into the current proposal.

Ongoing (annual) projects

These are projects which achieve their goals/objectives within an average year, but intend to continue on an annual basis. CBT strives to build capacity among community groups in the Columbia Basin and will encourage diversification of funding for ongoing projects (different than multi-year projects – see above). Repeat applications for the same project are acceptable, but may be subject to reduced funding in subsequent years to allow for capacity building within other community groups. Applications for ongoing projects must include evidence of past progress and describe how information and recommendations from monitoring and evaluation of previous work has been incorporated into the current proposal.

HOW ARE PROJECTS SELECTED FOR FUNDING?

All submitted proposals will undergo the following evaluation process:

- Technical committees review and score proposals based on the technical viability of the proposed activities.
- Final selection is made by an overall committee based on combined technical and non-technical criteria (i.e. community support/involvement, leveraged funding, etc).

The evaluation process is a collaborative effort between staff of CBT and other Basin organizations/agencies with relevant expertise. This provides a strong skills set to ensure that project selection truly supports the priorities and objectives of this program.

All proposals will be reviewed and scored according to the following criteria.

- Community participation/support (30%)
- Environmental outcomes (30%)
- Organizational planning and capacity (15%)
- Cost-effectiveness (15%)
- Overall project quality, innovation and creativity (10%)

Environmental outcomes (30%)

CBT recognizes and appreciates the progressive continuum of attitudes and behaviour towards the environment. – Education creates an understanding and awareness which promotes behavioural change through environmental stewardship and encourages direct actions of ecosystem restoration and conservation. These criteria intend to reflect and reward the integration of this concept – applications are evaluated on clear demonstration of:

- a) the focus on ecosystem priorities;
- b) the value(s) and impact(s) associated with the activities to be undertaken (i.e. change in understanding, behaviour, and/or direct action); and
- c) the degree to which they incorporate more than one aspect of the continuum (education, stewardship, conservation, restoration).

Applications will be scored only on the pertinent questions. For example: school-based educational proposals only scored on school-based educational question; integrated proposals (i.e. including conservation and education components) are expected to address all associated questions (i.e. scored on both conservation and education questions).

- ***For projects which incorporate conservation/restoration activities – is the project explicit in terms of impact on ecosystem priorities, and are the activities technically viable?***
Clearly articulate the on-the-ground activities which will be undertaken and how they will impact ecosystem priorities. Where applicable, projects must be deemed technically sound by virtue of evaluation by a technical review committee in order to warrant further consideration. For restoration activities on private land, the application should address how the proponent(s) are prepared to address any legal or liability issues and requirements in timely and effective manner (see Target Area – page 2).
- ***For projects which incorporate stewardship activities – is the project explicit in terms of ecosystem benefits and behavioural outcomes?***
Clearly articulate the intended audience, and how the project intends to impact the behaviours of that audience – indicate the environmentally conscious actions which are likely to result from the project.
- ***For projects which incorporate school-based education – is the project comprehensive and concretely linked to the school curriculum?***
Outline how the project fits with BC's Instructional Resource Packages (IRP's – available at <http://www.bced.gov.bc.ca/irp/>). Support mechanisms and resources for students and teachers should be included in project plans. Learning outcomes should be clearly identified and how and when they will be measured/evaluated. Visible support from the district and/or respective school principal is recommended.

- **For projects which incorporate community-based education – is the project explicit in terms of anticipated ecosystem educational outcomes and appropriate measures?**
Clearly articulate the intended audience, educational delivery plan and what learning will come out of the project. Successful proponents will be expected to develop simple mechanisms to evaluate the success of the project compared to the goals.
- **For all projects – is the project consistent with any existing local and/or regional plans, where such plans exist?**
Plans can include those developed through government processes (e.g., Kootenay-Boundary Land Use Plan), or other multi-stakeholder processes (e.g., Salmo Watershed Fisheries Strategic Plan).

Community participation/support (30%)

The following is a list of ways in which community participation/support can be shown. Applications should demonstrate a broad spectrum of community support and involvement by providing evidence of as many of the following as are applicable. Not all components are necessary to warrant a strong evaluation of any given project.

- **Does the project involve a collaborative partnership?**
Identify any other groups/organizations actively involved and working together in developing/undertaking the project. *N.B. Contributions of money and/or time do not necessarily indicate a partnership. For example contributions of time that can be clearly demonstrated through specific activities make it easier to determine if a partnership exists)*
For school-based projects, partnerships could be within a school (students, parents, teachers, administrators) or between schools and/or school/community groups.
- **Do the project activities involve a number of outside groups/audiences?**
Describe any intended community/school demonstration element, tours of the project by the public and/or schools, or other outreach component which will expose the project to additional audiences.
- **Did the project emerge from a community consultation process?**
If applicable, identify what process was used to engage the community/school in the development of the project. Did the project come about from an identified need/concern/issue? Refer to any existing local and/or regional community process/plans which the project is linked to or based upon.
- **Do the project activities include a community consultation/education process?**
If applicable, identify what process will be used to consult with the community/school in order to educate and/or further identify needs/concerns/issues.
- **Does the project application include letters of support?**
Letters obtained from municipal/regional governments or agencies, community groups/organizations and/or others can indicate support for a project idea. Letters of support must clearly indicate how the supporter will either contribute to (cash, in-kind, volunteers), be involved in, and/or be impacted by, the project. Strength of support, not quantity of letters (4 maximum allowed), will be considered. Submit letters that indicate a broad range of support **and** add value to proposal.
- **Are there substantial community contributions to the project?**
Leveraging includes funds from other sources, in-kind contributions, volunteer involvement, etc. (contributions **to** project as opposed to partnerships **in** project).

Organizational planning and capacity (15%)

To ensure effective completion of the project, the organization or partnership undertaking the project will have planned appropriately, as evidenced by use of:

- a) experience/expertise which the proponent either has or has sought; and/or
- b) information from similar/past projects.

- ***If the project has been previously funded, has prior success been demonstrated?***
Past project success should be demonstrated by explicitly referring to prior evaluation data and how those results have been incorporated into the present project plans.
- ***If not previously funded, has the project been built upon past success or relevant experience/expertise?***
Describe any involvement in similar projects in the past, including reference to available evaluation data; and/or; make reference to the involvement of experienced individual(s)/group(s) in the present project if similar work has not been conducted in the past.
- ***Has the project been planned and organized in a successful manner?***
Project should be described in a logical manner that shows forethought and the ability to undertake the project. Clearly outline necessary work tasks, how the technical/organizational requirements will be met, activity timelines and relationships between project activities and intended outcomes.

Cost-effectiveness (15%)

The need/purpose for major cost items should be demonstrated – budgets should indicate number of workdays and daily rate (where applicable), and be comparable to costs of similar projects.

- Are administrative costs reasonable and justifiable in relation to total project costs?
- Are required fees, salaries or wages in line with the skills provided, activities proposed and regional market conditions?
- Are the number of workdays allocated to tasks proportionate with the proposed objectives and activities?
- Are any necessary capital purchases justified?
Justification will be evaluated in terms of (a) requirement for specific project-related purpose; (b) opportunities for long-term use; and (c) contribution to community capacity building.

Overall project quality, innovation and creativity (10%)

CBT strives to recognize successful continuing projects, meanwhile encouraging new projects. These criteria strive to maintain such a balance in the types of projects which are funded:

- a) Continuation or extension of prior work which has proven environmentally and/or educationally effective, and
 - b) Support for new and innovative environmental projects and partnerships.
- ***In general, is the project approach of high quality, clearly built on previous learning and experience and/or incorporate new, innovative, or creative approaches to education, stewardship, conservation and/or restoration in the Basin?***
Example considerations:
 - To what extent does the project address the goal, scope and priorities of this program?
 - Does the project reflect a creative approach to a community environmental issue?
 - Does the project take a holistic approach (integrating social, economic and environmental values)?

HOW DO I APPLY TO THIS PROGRAM?

Obtaining the application form: Application forms are available from CBT's website (www.cbt.org/programs) or available by contacting any CBT office at 1.800.505.8998 or via email from Rick Allen at rallen@cbt.org.

Completing the application form: Use this guide to assist in completing application submission. Due to the typical volume of submissions, applicants are to be respectful of the space provided in the application form.

- Please be clear, succinct and use point form where appropriate.
- Be thorough and complete the application in full; selection will be based on the information submitted within the application form only.
- Letters of support (4 maximum) can be submitted along with the application form, in hard copy only with signatures.
- Additional documents (other than letters of support – 4 maximum) will not be considered in the evaluation process.
- Proposals that are unsigned, improperly signed or sealed, conditional, illegible, obscure, contain arithmetic errors, erasures, alterations or irregularities of any kind may be rejected.

Questions:

For general program inquiries, contact:
Rick Allen, Program Manager, Environment at 1.250.417.3665 or 1.800.505.8998 or rallen@cbt.org.

For assistance with proposal development and/or technical support, you may be referred to the appropriate Stewardship Advisor (based on either location or inquiry focus).

HOW DO I SUBMIT AN APPLICATION?

Deadline for submissions is 3:30pm PDT/4:30pm MDT Monday, May 25th, 2009.

1. Applications will be accepted at any CBT office. See below for addresses.
2. Digital copies are required and must be emailed to eip@cbt.org, before the deadline. Verification of receipt will be given Disk/CD copies will not be accepted
3. All submissions must include one signed hard copy of the application form. In case of any discrepancy, the signed hard copy will be considered as correct. Signed hard copy (signatures are to verify accuracy and completeness):
4. Faxed applications will not be accepted
5. Mailed or hand delivered applications must be clearly postmarked before the deadline.
6. Letters of support (Four maximum) are to be submitted with the hard copy application only, with signatures.

Please Note: This year CBT wishes to track the number of Full Time Equivalent positions created as a result of our investments in EIP projects. Successful proponents should be prepared to track and report out on the amount of employment generated by their specific funded project. Contact CBT for more information.

Address the application package to:

Environmental Initiatives Program Columbia Basin Trust

P.O. Box 393
#512 - 8th Street N.
Golden, BC V0A 1H0

OR

PO Box 220
220 Broadway
Nakusp, BC V0G 1R0

445 – 13th Avenue, Suite 300
Castlegar, BC V1N 1G1

OR

828D Baker St
Cranbrook, BC V1C 1A2

- Absolutely no applications and/or supporting letters received after the deadline (as stipulated above) will be accepted.
- All submitted applications and supporting documentation will become property of Columbia Basin Trust and will not be returned to the applicant following evaluation.

NOTIFICATION OF RESULTS:

- Successful and unsuccessful applicants will be notified by letter in late June.
- Once this letter has been received, applicants are welcome to contact CBT for further discussion.
- Columbia Basin Trust and its agents shall not be obligated in any manner to any applicant whatsoever until a written agreement has been duly executed relating to an approved application.
- Columbia Basin Trust reserves the right to fund all, part or none of any application submitted.

DEFINITIONS, INSTRUCTIONS and EXAMPLES TO ASSIST IN APPLYING

Please review the following to assist in completing the Application Form.

PROJECT SUMMARY

GEOGRAPHIC AREA

Enter one or more communities that will benefit from this project. A map identifying the location of the project would be appreciated (hand drawn acceptable). Examples:

- a specific area (i.e. watershed) or community (Cranbrook)
- a geographic region such as RDEK Electoral Area B
- Basin-wide (if your project area includes the entire Canadian Columbia Basin).

PROJECT DESCRIPTION

Brief statements to outline your project.

- General idea/aim of the project.
- Main type of activity, i.e. education, stewardship, conservation/restoration, etc.
- For projects that include physical works, please provide a drawing (hand drawn acceptable) to describe the project.
- How will this project benefit the community?
- Who is the target audience for this project? (i.e. community-based, school-based, etc.)

APPLICANT BACKGROUND (applies to Section 3)

Provide information, relative to the applicant (sponsoring group or organization) which describes the following, if applicable:

- Any partnership which has been established to develop and/or undertake the project.
- Brief details regarding any past project experience.
- Any particular expertise and/or experience which has been utilized in the project development (i.e. participation of technical experts, RPBios, etc.).
- This section should address a portion of the 'Organizational planning and capacity' selection criteria

PROJECT RATIONALE (applies to Section 4)

Briefly outline the background behind the current project being proposed.

- How was the project idea developed? Why is this project important or necessary?
- Describe any consulting or involvement of other groups or target audiences which assisted in project development.
- Was the project developed in response to recommendations from a previous assessment, any community strategic plan or concern, or is it complementary to an existing program or initiative? Provide references.
- Is this project a continuation or extension of an existing project? Provide references to any evaluation data from prior work and how it has been incorporated into the current project.

COMMUNITY SUPPORT (applies to Section 5)

Briefly outline how the community supports and/or is participating in the project, number of supporters and how many participants the project will reach. Provide information which will help address the 'Community participation/support' selection criteria.

PROJECT DETAILS (applies to Section 6)

Goal: What you wish to achieve. The ultimate intended effect(s), consequence(s) or result(s) that will occur from carrying out your project activities/work plan.

- Do not list here what you are going to do, or how, that comes later.
- Goals are written as simple, broad statements – if it takes too many words to express the goal, it may need to be more carefully thought through.
- Goals need to be achievable, believable and realistic.
- Your project may have more than one goal.

Objective: More specific shorter term results or intentions that will occur, through your project work plan, in order to lead to your ultimate goal. These should be measurable things (i.e.: your criteria for success) - to see whether or not you are on the right track towards achieving your goal.

- Do not list here WHAT you are going to do, or HOW. That comes later.
- Objective statements should explain the following:
 - A. the results you want:
Example: will show improvement, will subsidize, will be reduced, will demonstrate, will achieve, will be barrier free, will increase, etc.
 - B. the specific target group being addressed:
Example: grasslands, aquatic ecosystems, specific species, school-aged children etc.
- Less broad statements, should relate back to a specific goal (i.e. each goal statement needs at least one objective). You may have multiple objectives for each goal.
- Objectives are your measurable criteria for success. They are precise, clear, reasonable and achievable.
- Prioritize the objectives, stating the most important first.
- This section of your application should explicitly address the 'Environmental outcomes' component of the project selection criteria.

Workplan: The details of what you are going to do and how. How will you carry out your project activities to make sure the objectives will be achieved?

- Be sure to include all the activities and tasks to be carried out. What you are going to do, how you will do it, and by whom.
- The sequence of activities should flow to help achieve your project. For example, activities could be listed chronologically, by phases, or clusters of activities.
- The work plan should relate back to your goal. Ask yourself, how is this activity helping me achieve my ultimate goal?

Measures: Measures are specific tasks to help you evaluate your project. You have identified what you ultimately intended to achieve (both broadly in your goals and more specifically and measurably in your shorter term objectives), now you need to think about how you will measure your success.

- Refer back to your objectives for your criteria for success. If you have done a good job in thinking about how you will know if you have succeeded, then identifying measures will be relatively easy.

EXAMPLE:

- Objective: participants will have acquired necessary skills. (Criteria for success: necessary skills acquired.)
- Possible measures: (1) distribute a questionnaire or evaluation form to participants which asks them whether or not they feel they have acquired the necessary skills; (2) evaluate the test scores of participants for the activities undertaken to teach the skills.

PROJECT BUDGET

Budget Item - The following are examples of information that may be included in your budget under each section:

- Administration/Overhead/Office Expense
- Admin wages/benefits (daily rate multiplied by # of days), rent, utilities, bookkeeping, license fees, insurance fees, telephone, fax, email, Internet, office supplies, photocopying
- Capital Purchase/Equipment Rental/Supplies
- Purchases, project-specific equipment rental, lease fees
- Travel
- Accommodations, mileage, meals
- Training

- Course fees, book expenses
- Promotion/Advertising, flyer distribution, flyer printing, design costs
- Consulting/Contractors/Wages/Fees
- Please list for each separate position; a) purpose; b) daily rate multiplied by # of days.
Note: List administration wages in the Administration section.

Amount - list the total dollar amount for each individual item under this column.

Source – please indicate those items for which the funding source is known. For example:

- If a certain item has been donated, list the source as “in-kind”.
- If the contributions from a particular funding agency are directed towards specific items, list the “agency name” as the source.
- For those items which potential funds from CBT will be directed towards, please list the source as “CBT”.

Sub Totals - for each SUB TOTAL, sum all the individual values under the relevant section. Please see the example budget sheet below, under Promotion/Advertising.

Total Project Budget – this should be the sum of all the SUB TOTALS for the various sections. Please see example budget sheet below.

FUNDING SOURCES

An important consideration in project evaluation is the project's ability to leverage CBT dollars with funding and in-kind contributions from other sources.

Agency/Company It is important to include ALL leveraged funding sources (from community organizations, other funding agencies, etc)

In Kind/Cash Indicate whether the contribution is cash or in-kind (e.g. volunteer hours, office space, equipment, etc).

Confirmed (Y/N) Indicate whether or not the contribution is confirmed at the time of submitting the application to CBT.

Contributions to be used primarily for what purpose? List the project budget items which the funding will be contributing towards. This is especially important for CBT's contribution – for what items/activities do you intend CBT funds to be spent on?

Amount requested from CBT Please remember that the maximum request for any given project is \$20,000. Indicate the main activities/budget items of the project which CBT funding will be contributing towards.

Total funding sources The intent is to show that your attempts to obtain funding will sufficiently meet the needs of completing your project. I.e. The TOTAL FUNDING SOURCES amount (confirmed PLUS unconfirmed) should equal or exceed the TOTAL PROJECT BUDGET to ensure the project can proceed should you be successful in receiving funding. (Please see example funding sources table below.)

FINANCIAL DETAILS

If there are any items which warrant further explanation, do so in this section. If a project is intended to extend over multiple years, provide evidence of realistic sustainability plans which are in place – i.e. how will the project be sustained financially in subsequent years, beyond CBT's potential current funding contribution.

PROJECT BUDGET

This is an example of a budget only.

BUDGET ITEM	AMOUNT	SOURCE (CBT, In-kind, other funder)
Administration / Overhead / Office Expense		
Office space rental (\$200/month x 5 months)	1,000.00	Partial in-kind (Chamber)
Office supplies	600.00	Town of Golden
Phone/fax (\$150/months x 5 months)	750.00	Town of Golden
Internet (\$100/month x 5 months)	500.00	In-kind (ABC Electronics)
SUB TOTAL (Administration, etc)	2,850.00	
Etc ...		
...		
...		
SUB TOTAL (Etc ...)	...	
Promotion / Advertising		
Advertising	500.00	Partial in-kind (local paper)
Design costs	700.00	CBT
Flyer printing	1000.00	CBT
Flyer distribution	300.00	In-kind (volunteers)
SUB TOTAL (Promotion/Advertising)	2,500.00	
TOTAL PROJECT BUDGET	5,350.00	

FUNDING SOURCES *example only*

AGENCY/COMPANY	In Kind/ Cash?	Confirmed? (Y/N)	AMOUNT	Contributions to be used primarily for what purpose?
Local chamber of commerce	In-kind	Y	500.00	Office space
ABC Electronics	In-kind	N	500.00	Internet/email (for 5 months)
Kootenay Advertisements	In-kind	Y	250.00	Advertisements
Project steering committee	In-kind	Y	300.00	Flyer distribution
Town of Golden	Cash	N	1300.00	Admin/overhead/etc.
SUB TOTAL (Leveraged funding)			2,850.00	
Amount Requested From CBT			2,500.00	Promotion/advertising/ etc.
TOTAL FUNDING SOURCES			5,350.00	