

Sierra Nevada Conservancy-Progress Report

Sierra Nevada Conservancy Grant Program Safe Drinking Water, Water Quality and Supply, Flood Control River and Coastal Protection Act of 2008 (Proposition 84)

Grantee Name: Friends of Deer Creek

Project title: Sierra Nevada Science Institute- Development of a
Timeline and Business Plan

SNC Reference Number: SNC 070098 Submittal Date: January 26, 2012

Report Preparer: Lisa Frankel

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Check one:

6-Month Progress Report

Final Report

6-Month Progress Reports should reflect the previous six months. Final Reports should reflect the entire grant period.
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A. Progress Report Summary: (Please provide a general description of work completed during this reporting period.)

During the last quarter of work on this project, the final draft of the business plan was presented to the Sierra Streams Institute Board of Directors at the September 2011 board meeting and to the staff at the September 2011 staff meeting. This provided both groups an opportunity to comment before the final report went to press. Following this review process, the layout and graphic design was completed, final proofs checked and the report was printed.

B. Deliverables or Outcomes completed during this Reporting Period or Milestones Achieved: (Include specific information, such as public meetings held, agency participation, partnerships developed, or acres mapped, treated or restored.)

As we moved into the process of writing the business plan we realized the need for comprehensive strategic planning, which we then initiated. Once the strategic planning was completed we had rewritten our vision, mission and goals as an organization and identified the program areas for our expanding organization in preparation for the completion of the business plan. We were able to use components of our planning to promote programs and attract donor support even before the business plan document was completed. In August and September 2011 we used elements of the business plan to create promotional materials for our new education programs including a Watershed Science Classes for Home School Students in Grades 5-8, to present our Research Program to the annual meeting of the Ecological Society of America in Austin,

Texas and at the Annual Meeting of the CA Aquatic Bioassessment Workgroup at UC Davis in November 2011. Parts of the plan have been used to compile a proposal promoting our Training Program to the State of CA, and for inclusion in numerous grant applications.

Clarification of our programs as we developed the business plan has helped us communicate clearly to our local and regional partners and collaborators. Examples include active participation on the Yuba Bear Watershed Council, close project collaboration with the Yuba Bear Land Trust, the South Yuba River Citizens League, The Sierra Fund, local government agencies and the State of CA Water Resources Board.

C. Challenges or Opportunities Encountered: (Please describe what has worked and what hasn't; include any solutions you initiated to resolve problems. If your project is not on schedule, please explain why here.)

One of the greatest challenges in completing the plan has been deciding when we are "done" with the process. New opportunities continue to arise that have affected the planning and budgeting for the future. Some examples include: the opportunity to acquire a very useful and expensive piece of lab equipment, an atomic absorption spectrometer, for free, and the need to adjust the budget and lab development timetable to accommodate the change in our timeline; the opportunity to have three Americorps staff in 2012 affecting the salary budget, but also enabling some projects to move up on the timeline because we'll have one more staff member than we had anticipated.

D. Unanticipated Successes Achieved: (Please describe any additional successes beyond completing scheduled tasks or meeting scheduled milestones.)

Although the grant funding for this project was limited, the process of assessing the need for and developing a plan for a watershed science institute has resulted in the other accomplishments en route to our goal including:

- Changing our name
- Expanding our mission
- Articulating our goals
- Developing short to long term strategies for future development
- Designing a new and comprehensive program structure (which is already fully functional)
- Building a new website
- Revamping our accounting procedures
- Moving to a much larger facility
- Evaluating staffing needs (and planning for the future which is "now")
- Developing a growth plan for 2012 centered on our stated program goals

E. Compare Actual Costs to Budgeted Costs: (Please refer to your grant agreement to list your deliverables/budget categories and budgeted costs compared to actual costs incurred during this reporting period in the table below.)

PROJECT BUDGET CATEGORIES	Budgeted SNC Dollars	Actual Dollars
A. Consultant	\$22,250	\$23,101
B. Develop business plan & implement plan with research of potential funding sources	\$10250	\$9,399
GRAND TOTAL	\$32,500	\$32,500

Explanation: (if needed)

The Strategic Business Assessment document that was completed with the funding from this grant is only a piece of the successful process that was initiated by the grant. After beginning the development of the business planning process, we applied for and received additional funding from a 3-year grant from the CA Wellness Foundation to support general operations as we expand the scope of our programs and a 3-year CA Department of Conservation grant to expand our organization into a regional entity. The DOC grant has been renewed for three additional years.

F. Do you have information to report on the project-specific Performance Measures for your project? (If so, please list the Performance Measures below and describe your progress.) N/A

G. Were there any other relevant materials produced under the terms of this Agreement that are not a part of the budgeted deliverables? If so, please attach copies. (Include digital photos, maps, media coverage of project, or other work products.)

Website: www.sierrastreamsinstitute.org

Letterhead

Program brochure

Education program flyers

Newsletters – Spring and Fall 2011

H. Next Steps: (Work anticipated in the next 6 months, including location and timing of any scheduled events related to the project.)

We expect to use the completed report when applying for grant and foundation funding, as well as to communicate our program plans to private donors. Select parts of the plan can also be used for public relations communications informing the community about the activities of our organization.

Please Complete this Section for FINAL Report ONLY

Capacity-Building Results and Collaboration and Cooperation with

Stakeholders: (What partnerships did you initiate or strengthen as a result of this project? How did they affect the project outcome? If applicable, how did this grant increase your organization's capacity? What is your plan to sustain this increase?)

Many partnerships have been initiated and strengthened as a result of this project which started with surveying and interviewing over 100 watershed groups in CA (and a few outside the state). During the process of interviewing key personnel in several dozen groups, new relationships were formed as we discussed mutual challenges and concerns in our respective organizations. In addition to local groups such as Wolf Creek Community Alliance, The Yuba Bear Land Trust, SYRCL, Tahoe National Forest, CA Native Plant Society and many others with whom we already had a working relationship, we conducted on-site and telephone interviews with groups as far afield as the Siskiyou Field Institute in southern Oregon, the Mountain Studies Institute in Colorado, and the San Francisco Bay Estuary Institute. The process also gave us the opportunity to promote services that we can offer other organizations including laboratory and training, and our macroinvertebrate identification publication, *The Bug Book*. In the course of the interviews we learned more about how the services we are offering could be used by other groups and equally as important, what financial challenges might present obstacles to the groups in need of our services.

As we reviewed the results of our survey of California watershed groups that are members of, SWAMP (California's Surface Water Ambient Monitoring Program), we were able to formulate a program design that incorporated our existing expertise, the needs of groups with much less experience, our awareness of developing watershed challenges and our awareness of the growing lack of state government resources.

Description of Project Accomplishments:

1. Most Significant Accomplishment

Describe in one concise, well-written paragraph, the most significant accomplishment that resulted from this grant.

The most significant accomplishment that resulted from this grant is the transformation of the small, locally focused creek restoration and protection organization, Friends of Deer Creek, into Sierra Streams Institute, a watershed science institute. The new organization, new name and expanded program focus has already brought:

- national attention from the Institute for Conservation Leadership for our use of volunteers
- state recognition as a resource for watershed science training statewide
- local success through youth education programs

Without the grant funding to write a business plan and complete the necessary market studies and program planning, this success would not have been possible.

2. WOW Factor

If applicable, please describe anything that happened as a result of the project or during the project that is particularly impressive.

The WOW factor for us organizationally has been seeing how much more of an impact we can make now that we have expanded the scope of our programs. We are educating more students, analyzing and sharing our data with other organizations, training other groups to use the successful strategies we've developed, expanding our research into the impacts of climate change, exploring the effect of environmental contaminants on human health and discovering how powerful collaboration with other groups can be in achieving our goals.

3. Design and Implementation

When considering the design and implementation of this project, what lessons did you learn that might help other grantees implement similar work?

We originally planned to have an outside consulting firm write our business plan. After initially engaging a firm that was recommended by a trusted advisor to our organization, we realized that our (at that time) very small organization was not ready with a clear vision of our intended new direction. Before a business plan could be written, we needed to do some preliminary strategic planning. We also realized the strategic planning would take time and needed to be a somewhat organic process. We requested permission from SNC to change contractors and instead of a consulting firm we hired an individual who worked

closely over more than a year with the staff and board to carefully craft a strategic plan that could then be translated into a business plan. We would caution other organizations intending to write a business plan that much preliminary planning is required before the business planning part of the process can be completed.

4. Indirect Impact

Please describe any indirect benefits of the project such as information that has been developed as a result of the project is being used by several other organizations to improve decision-making, or a conservation easement funded by this grant that encouraged other landowners in the area to have conservation easements on their property.

The indirect impact of this project is really described in question two where we describe the "WOW" factor. We are already doing more training of other groups, sharing of research data, collaboration with other watershed and science education organizations, providing more lab services and educating youth in watershed science than we were before we began the writing of the business plan. These successes are indirect impacts of the writing of the plan itself and the development of our organization as a stable business entity.

5. Collaboration and Conflict Resolution

If you worked in collaboration or cooperation with other organizations or institutions, describe those arrangements and their importance to the project. Also, describe if you encountered conflict in the project and how you dealt with it, or if there was conflict avoided as a result of the project.

The process of actually writing the Strategic Business Assessment 2011 did not involve collaboration or cooperation with other organization. However, as mentioned in the introduction, "**Capacity-Building Results and Collaboration and Cooperation with Stakeholders;** many interviews with and a survey of other watershed and environmental science organizations contributed to our planning process as we developed our new goals. In addition, we are one of several environmental organizations operating in a very small town and our expansion has necessitated an adjustment in our relationships with the other organizations. Changes in our relationships with other groups is reflected in more focused collaboration on new projects for both effective use of available grant funding as well as volunteer efforts and staff time.

6. Capacity-Building

SNC is interested in both the capacity of your organization, as well as local and regional capacity. Please describe the overall health of your organization

including areas in need of assistance. SNC is interested in the strength and involvement of your board, significant changes to your staff, size and involvement of membership. In addition, describe how your project improved capabilities of partners, or the larger community.

We feel that as a result of the business plan and all the work that we did to complete it, we have very substantially strengthened our organization. When the grant was first issued we had three paid staff members, no employee benefits and were housed in a 700 square foot office. In other examples, our accounting procedures were careful but simple, outreach and public relations were modest and our infrastructure, e.g., telephones, was minimal. Today we have six fulltime staff, three Americorps members and several contractors working on various projects, we offer partially employer paid health and dental benefits, we are housed in a 2200 square foot office and lab, we are using specifically designed non-profit accounting software, and we have expanded our outreach and public relations significantly. The results of these changes are that we can attract and retain better employees, we have room to house staff and program activities on our premises, we are attracting the notice of more donors and volunteers, and we have much greater capacity for collaborating with other organizations to have a greater positive impact on the health of watersheds throughout the region and the state. In addition our board has participated in several development activities, additional members have been recruited and we are in the process of creating a Science Advisory Committee.

7. Challenges

Did the project face internal or external challenges? How were they addressed? Describe each challenge and any actions that you took to address it. Was there something that SNC did or could have done to assist you? Did you have to change any of your key objectives in response to conditions "on the ground"?

Growing pains appear to be inevitable. Friends of Deer Creek was founded by a group of dedicated community members in Nevada City. Many local residents have volunteered with the organization for years. It has taken some effort to help local members and volunteers understand why we changed our name and expanded our mission. We have been sending regular newsletters and other communications to supporters explain the reasons for the changes we've made as we expand. We invited more than 500 people to a special open house event (approximately 150 attended) in December 2010 where we introduced our new programs, showcased our new facilities and explained the reasons for the changes we were making. This was followed up by regular email newsletter communications.

The greatest challenge to us during the term of the grant has been the financial crisis that began in 2008. In spite of our relative success, we are feeling the economic pinch. Fewer grants are available to fund the programs that we know

are needed to maintain and protect watersheds throughout the state and to train more groups to do this important work. Though we have increased our donor base, analysis shows that the average size of donations is lower than before 2008. Though we didn't change our key objectives, we may be faced with a longer timeline to achieve the goals we have set due to limited funding for many of the programs.

8. Photographs

Grantees are strongly encouraged to submit photos, slides or digital images whenever possible. These images will be used for SNC publications such as annual reports or on the website. Please make sure you clearly identify location, activity, and your project with each submitted image. Images will be credited to the submitting organization, unless specified otherwise.

CD attached.

9. Post Grant Plans

What are the post-grant plans for the project if it does not conclude with the grant? Include a description of the following (if applicable): (1) Changes in operations or scope; (2) Replication or use of findings; (3) Names of other organizations you expect to involve; (4) Plans to support the project financially, and; (5) Communication plans?

(1) Changes in operations or scope:

We have accomplished much, but there is more to be done to create the science institute that we aspire to be. This project has helped us identify the additional measures that must be taken to accomplish our institutional goals. The next step is to create a growth plan to take us through the next 5 years.

In 2012 as we begin our program expansion we hope to:

Engage an independent consultant to complete an organizational assessment to determine staffing needs and organizational structure for further expansion. We anticipate that this process will take about 6 months. To conduct the assessment we envision that a consultant will guide the board, staff and other key stakeholders through a review process of Sierra Streams Institute's capacities with regard to staff resources, management, governance, programs, and environmental challenges and opportunities.

Expand our financial tracking and reporting procedures. We began this process through the conversion of our bookkeeping system to QuickBooks for Nonprofits in 2010. The next step is to allocate funds for an accounting staff person to set up a financial reporting system that integrates program

expense, grant funding and cash flow data for board and management decision making. Currently this work is done by a dedicated volunteer.

Upgrade computer technology. Sierra Streams Institute owns a few computers that are several years old, staff members are using their own computers and there is no file sharing mechanism or protocol. Funding is needed for computers for all programs and administration as well as software and networking set-up.

(2) Replication or use of findings:

Once these tasks are completed we will have the staffing model, detailed financial data and technological resource to:

- Outline program funding needs
- Develop a system of metrics to track programs
- Create a plan for systematic evaluation over time
- Evaluate our office, classroom and lab space needs
- Develop systematic marketing and public relations activities
- Support fundraising activities

(3) Names of other organizations you expect to involve:

Our continued work on behalf of the environment requires that we increase our collaborations with other local environmental organization engaged in similar work. We expect to continue to involve SYRCL, Wolf Creek Community Alliance, The Bear Yuba Land Trust, American Rivers, The Sierra Fund, CA Native Plant Society, local Federal agencies including the Tahoe National Forest and the BLM as partners in our work as we continue to expand. We are working closely with CABY IRWMP to integrate our projects into a larger, regional vision, and our local collaborations will be essential for the success of these regional projects.

(4) Plans to support the project financially:

A three year grant from the CA Department of Conservation helps to fund a grant-writer and we will continue to apply for government and private foundation grants to support our programs. As described in our business plan, an increasing percentage of our income will come from select fee for service programs including fees for lab and training services provided to other watershed organizations, and tuition for education programs. In addition we are expanding our fundraising efforts to increase the number of donors and the size of donations.

(5) Communication plans:

The completed Strategic Business Assessment 2011 has been distributed to members of the Board of Directors, and is being prepared for distribution to our funders and key supporters. As mentioned earlier, components of the plan

describing specific programs have been used in presentations to the public and to collaborating organizations and project partners. Pages of the business plan have been used in Power Point presentations to the public and at conferences and we plan to continue to use it this way. We've reproduced some parts of the plan in poster form and displayed them on the walls in our office. We expect to use this document to introduce our organization to the public and to our funders.

10. Post Grant Contact

Who can be contacted a few years from now to follow up on the project? Please provide name and contact information.

Contact Joanne Hild, Executive Director

joanne@sierrastreamsinstitutue.org

Sierra Streams Institute/Friends of Deer Creek

431 Uren Street, Suite C

Nevada City, CA 95959

Ph: 530.265.6090 ext. 200

SNC-approved Performance Measures: (Please list each Performance Measure for your Project, as identified in your Grant Agreement, and the results/outcomes.)

N/A

Sierra Nevada Conservancy Grant Program Project Reporting Guidelines

Progress Reports are required periodically throughout the term of the Grant Agreement (Refer to Exhibit B of the Grant Agreement). These reports will allow you and the Sierra Nevada Conservancy (SNC) to see the degree to which the project is on track and achieving your projected outcomes. Your Progress Reports will further provide the SNC with information that will help us to explain your work to the Board Members and various other audiences. Timing of Progress Reports is specified in the Project Schedule included in Exhibit A of the Grant Agreement, but generally every 6 months until completion of the project.

A Progress Reporting Form is provided to Grantees on the SNC Website. **Six-month Progress Reports** should reflect the previous 6-month period; **Final Reports** should address each question for the entire grant period – looking at the project as a whole.

The form specifies the items you will need to report on. For the Six-Month Interim Report these include, but are not limited to: *A Progress Report Summary of work completed, Deliverables or Outcomes Completed, Challenges or Opportunities Encountered, Unanticipated Successes Achieved, Actual Costs compared to Budgeted Costs, Any Additional Relevant Materials Produced, and Next Steps.*

The Final Report will include additional information, such as: *Resources Leveraged, Capacity-Building Results and Collaboration and Cooperation with Stakeholders, a Description of Project Accomplishments, and SNC Approved Performance Measures.*

Please make sure that you submit complete reports by the dates requested in your Grant Agreement.