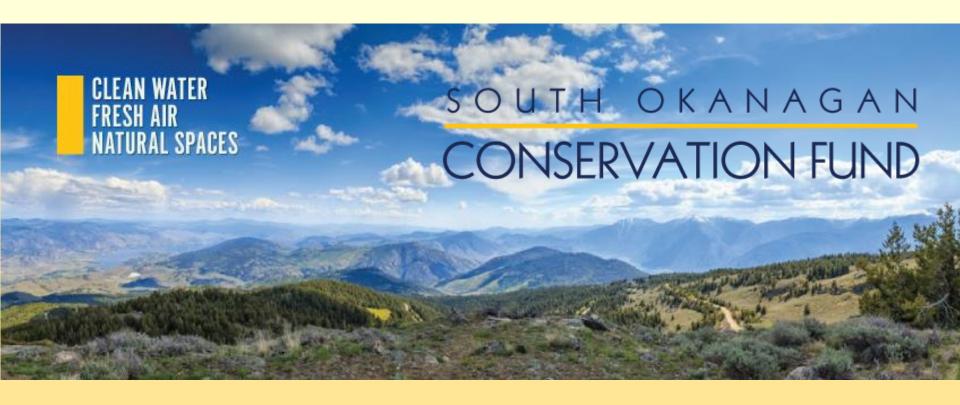
Local Conservation Funds: Empowering and Enriching Local Communities



Bryn White,
Consultant, Administrator
South Okanagan Conservation Fund

Many thanks to the CDFCP for sponsoring these conversations on establishing local conservation funds.







Photocredit: Friends of Stillwater Bluffs

This project was undertaken with the financial support of:

Ce projet a été réalisé avec l'appui financier deL







What is a conservation fund?

- Local government service that establishes a dedicated source of funding (i.e., tax or levy) for environmental conservation and community sustainability projects.
- The regional district or municipality that holds the conservation fund decides which projects to support according to criteria in the fund's terms of reference.
- Funds support local priorities; protecting clean water, conserving natural areas, restoring fish and wildlife habitat, and protecting ecosystems and services/benefits they provide.
- Opportunity to leverage additional funds from outside the community is significant.



Why establish a conservation fund?

Three Good Reasons

- **Ecosystem services** clean water, pure air, soil, pollination, flood and fire protection...
- A healthy environment supports a healthy economy climate resilience, property values; attractive, investable, and safe communities; tourism, agriculture, renewable resource sectors, natural places for people to enjoy.
- **Local control** Funds are generated locally and directly benefit the region and the communities.



Conservation Funds Can:

 Protect the integrity of watersheds and aquifers; ensure clean, abundant water resources.

- Contribute to climate resilient communities; protecting natural areas that provide services like flood, erosion and fire protection.
- Build on a network of greenspace, and natural corridors for both people and wildlife.



Conservation Funds Can:

- Enhance quality of life, tourism and recreation opportunities.
- Enhance the viability of local agriculture, food production, and other renewable resources.
- Protect ecosystems to sequester carbon and meet community climate action objectives.
- Leverage significant funding from outside the community to achieve local goals.



Some examples....

- Reclamation.....restore and/or establish sensitive ecosystems, fish and wildlife habitat
- Protect and manage ecologically important areas for threatened and endangered species
- Community watershed projects, ensuring water quality and quantity
- Volunteer conservation activities on public and private land
- Environmental education and awareness (shoreline legislation/guidelines)
- Reduction of wildlife-human conflicts
- Citizen science and monitoring, and more.

From this....



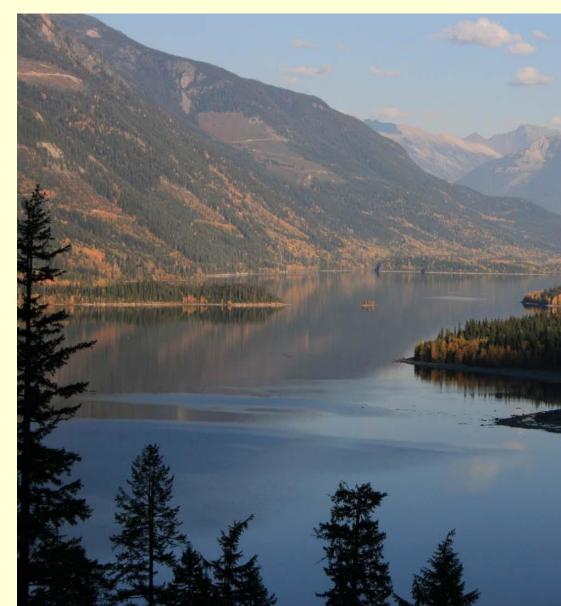
To this....





- Established Nov 15, 2008
- Conservation a subregional service delivered by the RD East Kootenays
- Up to \$230,000 raised per year
- \$20 Parcel levy
- Kootenay Conservation Partnership Administers this fund

Columbia Valley Local Conservation Fund





Established - Nov 15, 2014

- Conservation a sub-regional service delivered by the RD Central Kootenay
- Up to \$75,000 raised per year
- \$15 Parcel levy
- Kootenay
 Conservation
 Partnership
 Administers this fund

Kootenay Lake Local Conservation Fund





- Established 2019
- Conservation a subregional service delivered by the RD North Okanagan
- Up to \$102,000 raised per year (% of assessed value)
- Okanagan Conservation Partnership Administers this fund



- Established 2016
- Conservation a subregional service delivered by the RD Okanagan Similkameen.
- Up to \$450,000 raised per year (% of assessed value)
- Administration is contracted.







Strategy highlighted gaps in capacity to achieve conservation and sustainability priorities and needs.

Establishing a Local Conservation Fund – A Proposal

- Drawing on the conservation fund example in the Kootenays (Columbia Valley)
- SOSCP and local government laid out a process of learning together, public engagement, opinion and focus group discussions.
- Important to understand the perspectives on proposed fund from a wide array of stakeholders and constituents.



Community Conversations...







I think the South Okanagan is one of the most beautiful places in Canada, if not the world. I'm concerned about protecting the environment for all who live here.

Ernie Sheridan Real Estate Agent

Learn more at 🕹

SOlovethisplace.ca



If we're not going to step up and protect our natural spaces, who is? I've seen what can be done and it's amazing. Without the water and the grass, ranching wouldn't be possible. 29

Bridgette Daniels
Cattlewoman, Bobtail Ranch

Learn more at 😷

Solovethisplace.ca



CLEAN WATER FRESH AIR NATURAL SPACES

We have the most beautiful landscape I have ever seen. It's so important we work together to preserve it.

Natalie Minunzie Long-time Okanagan resident

Learn more at 🔿

SOlovethisplace.ca

Campaign Successful! South Okanagan Conservation Fund Established December 2016

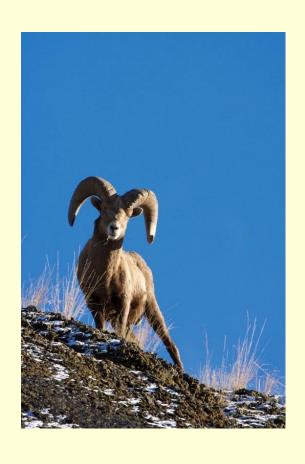


Successful public assent process and Conservation Service Bylaw established.

Conservation considered a "service" just like any other service provided by the LG

SOUTH OKANAGAN CONSERVATION FUND

How does it work?



- Enables regional district and municipalities to requisition property levy for conservation service based on assessed value in the service area.
- On average between \$7-\$14/household/year, for up to a maximum of \$450,000 per year in the service area.
- Fund governed by a Terms of Reference, local government is fund holder, decision maker.
- Funds disbursed to eligible non-profit organizations through application-based system, annual call for proposals.
- Technical Advisory Committee makes recommendations for projects to be funded.
- Funds in support of undertaking and administering activities, projects, and works that include, but are not limited to, water, environment, wildlife, land and habitat conservation efforts to protect natural areas.

SOUTH OKANAGAN CONSERVATION FUND

SOCF is guided by a Terms of Reference

Addresses key elements:

- -Background to Fund
- -Fund Purpose
- -Fund Administration Responsibilities
- -Conservation Themes and Goals
- -Guiding Principles
- -Time Lines
- -Governance -Fund Structure and Design
- -Technical Review Criteria and Guidelines



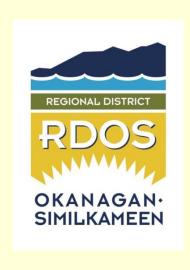
Okanagan Similkameen Stewardship Society

Important Appendices

- Appendix One: Ineligible Activities
- Appendix Two: Technical Review Committee Terms of Reference
- Appendix Three: Technical Review Committee Conflict of Interest Guidelines



RDOS Responsibility:



- ➤ **RDOS** maintains the integrity of the Fund, responsibility for approval of all matters related thereto, including projects, payments, and financial audits of the Fund.
- ➤ **RDOS** has agreement with contracted administrator for administrative management for a fee for service.
- ➤ **RDOS** appoints a Technical Advisory Committee to provide expertise in the review and selection of projects or recipients of funds.

Contracted Administrator: responsible for all aspects of Fund management and administration, other than the direct financial management.



Conservation Themes

Consistent with top local public environmental concerns including:

- Conservation and stewardship of water resources (quality and quantity, aquatic ecosystems, surface and groundwater); and,
- Protection (including acquisitions, enhancement and restoration) of sensitive terrestrial and aquatic ecosystems, wildlife species, and habitat for native fish and wildlife.





Governance and Decision-Making

- This is a tax-based Fund; taxpayers will be represented through their elected officials.
- The Fund was created to provide a conservation service. Technical merit is of utmost importance to determine which projects are supported.
- Decision making structure will be simple and cost effective.
- Appointed Technical Advisory Committee recommends projects for funding to RDOS; guided by Terms of Reference; includes Conflict of Interest Guidelines.





Governance and Decision-Making

• RDOS responsible for reviewing the recommendations of the Technical Advisory Committee and for granting final approval.

• Only the Board members representing the participating areas will be entitled to vote on the projects using the weighted vote system.



CONSERVATION FUND

Terms of Reference

Guiding Principles

- The review process will be as simple as possible; Projects ranked on technical soundness, technical effectiveness, and value for money.
- Projects ranked based on technical merit, regardless of where they occur within the Fund Service Area.
- Only highly ranked projects will be funded.



Fund design:

- A call for project proposals issued annually.
- Any funds not dispersed shall be carried forward to the next fiscal year.
- Projects must be in the Fund participating areas. Projects on <u>all land</u> <u>tenure types</u> will be considered.
- Multi-year projects are acceptable to a maximum of three years.





Fund design:

- Proponents must be an incorporated non-profit society in good standing or must partner with the same.
- Project evaluation includes consideration of conservation value for money.
- Proposals should reflect continuity with the Biodiversity Conservation Strategy Keeping Nature in Our Future.



Leveraging Power



Learn more at **SOconservationfund.ca**

SOUTH OKANAGAN CONSERVATION FUND

Total disbursement of SOCF funding since 2017 \$1.4 million

OUR IMPACT SINCE 2017

15 projects: 8 multiple year, 7 single year

Project Type		Total Disbursements	
\$ (\$)	Land Purchase for Conservation (558 acres preserved)	\$774,352	55%
	Aquatic Habitat Restoration	\$341,408	24%
	Voluntary Stewardship & Terrestrial Habitat Restoration	\$221,603	16%
ENEAGE	Community Environmental Outreach & Engagement	\$72,581	5%
	TOTAL	\$1,409,944	100%

Leveraging Power – Kootenay Funds

Columbia Valley Sub-regional Fund (between 2010 and 2020):

- Invested \$2.4 million
- \$18.9 million in partner dollars leveraged
- **Funded 80 projects** focused on: three large securements, restoration (grassland, creek and wetland); invasive plant management; species at risk recovery; water quality monitoring; climate conservation action and incentives for landowners





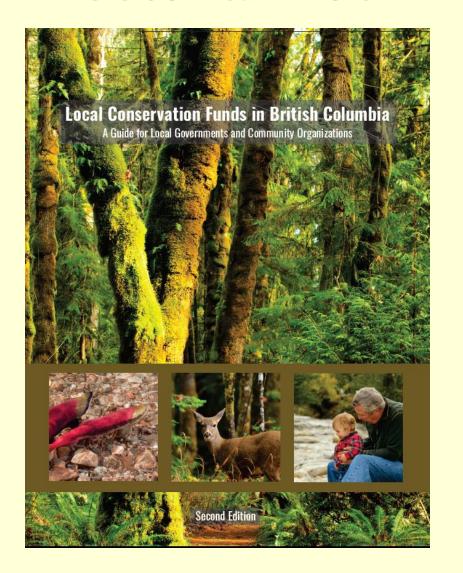
Leveraging Power – Kootenay Funds

Kootenay Lake Sub-regional Fund (between 2016 to 2019):

- Invested \$294,000
- \$725,000 in partner dollars and \$350,000 in kind for stewardship projects.
- \$93,000 invested plus \$17 million leveraged for large acquisition
- Funded 23 projects focused on: securement, restoration (grassland, creek and wetland); invasive plant management; species at risk recovery; land acquisition; water quality monitoring; climate conservation action and incentives for landowners



Where do I learn more?



Key steps for establishing a Fund:

- 1. Build your team
- 2. Determine community priorities
- 3. Make the case
- 4. Design the fund
- 5. Determine financing options
- 6. Determine establishment options
- 7. Gain participating area approval

www.soconservationfund.ca/conservation-fund-guide-bc/