

Morro Bay National Estuary Program Community Project Program: Steps to Partnership

Background

The Morro Bay National Estuary Program (Estuary Program) works to protect and restore Morro Bay and the lands that surround it by conducting monitoring and research to track ecosystem health, repairing natural habitats to protect water quality and wildlife, and educating residents and visitors on how to be good stewards of the bay. Our partnerships with agencies, nonprofits, landowners, and private citizens is crucial to our work. One aspect of this partnership has been our long-running Community Projects Program. The program supports community-based projects that help to implement specific actions identified in our Comprehensive Conservation & Management Plan (Management Plan).

Program Goal

The Management Plan outlines the priority issues for our estuary and watershed. The 2012 plan also includes 58 Action Plans that directly address these priority issues. The goal of the Community Project Program is for the Estuary Program to work collaboratively with partner organizations to implement these Action Plans. Ideally, projects have a component to increase public awareness. Projects can be focused on monitoring, research, restoration, or education & outreach.

Eligibility

Project partners can be individuals, organizations, and government agencies in the Morro Bay watershed, including the following:

- Nonprofit organizations (i.e., either 501(c)(3) or 501(c)(4) IRS status);
- Governmental or public agencies that work within the Morro Bay watershed (e.g., environmental commissions, planning boards, public works, parks, etc.);
- Private businesses and professional organizations whose activities affect the Morro Bay estuary and watershed; or
- Educators in the Morro Bay watershed with projects that can serve as models for others.

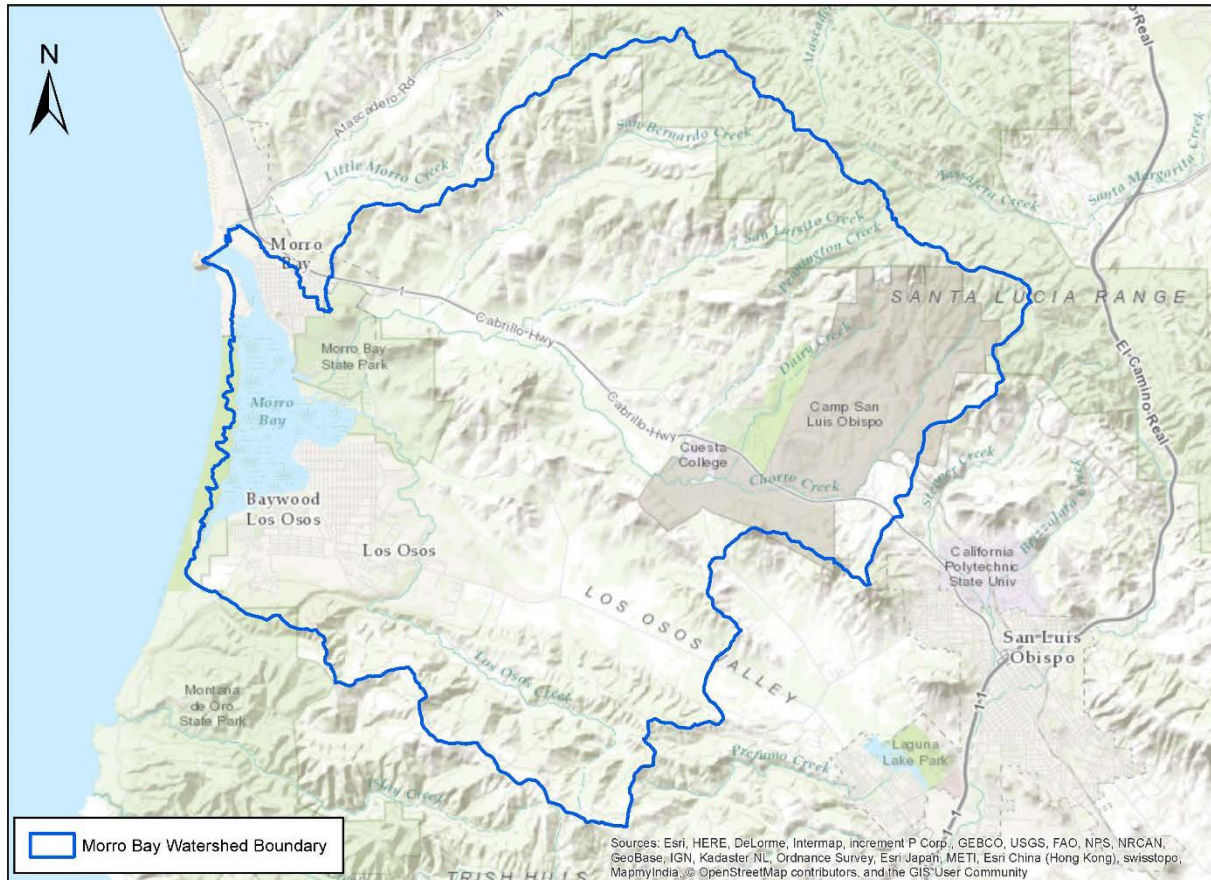
Please be aware that partners with an ongoing Community Project are not eligible to apply before completing an open project unless they receive prior authorization from the Estuary Program.

Some examples of ineligible projects include those proposed by for-profit organizations for business gains or projects that do not support our Management Plan's Action Plans. We will not fund advocacy efforts or lobbying.

Partners must work closely with Estuary Program staff to develop a potential project. We recommend reaching out at least two months prior to the application deadline to work closely with staff to develop the project goals, budget, schedule, and scope to help ensure project success. Partners that do not complete this step before submitting an application may be disqualified from further review.

Geographic Focus

Projects must improve conditions within the Morro Bay estuary and its watershed. Projects must have impacts within this study area (outlined by the blue line on the map below) to be eligible for the program.



Project Development Process

We would like to work closely with potential project partners to develop a project idea, create a realistic budget, and set a reasonable timeline. Part of the process also involves assessing a partner’s capacity to manage funding, contracts, etc.

Step 1: Develop Project Ideas

- Estuary Program reaches out to partners and the community to solicit ideas and shares guidelines of the program. Partners who have ideas should reach out to our staff. We will meet with partners at least once and possibly multiple times to discuss and develop the project ideas.
- If we feel that a project idea has potential, then the applicant would be invited to submit a simple application called a Concept Proposal, which would include a project description, project tasks, schedule, and budget. See separate Concept Proposal instructions.
- Ideally projects are of a size and scope that can be completed within one year.
- Please note that partners must participate in this collaborative process with staff in order to be eligible for funding.

Step 2: Staff Review

- Staff review the Concept Proposals to determine if they will move forward in the review process, per the following criteria:
 - o *Does the project align with our program goals?*
 - o *Does the project help implement our CCMP?*
 - o *Is the scope of work realistic?*
 - o *Is the applicant eligible?*
 - o *Is the proposed project a complete effort?*
 - o *Does the applicant have a track record of strong partnership with the Estuary Program?*
- Staff has the option to forward the application through the review process or determine that the project is not a good fit and remove it from further consideration.

Step 3: Expert Review

- The appropriate technical advisory committees (TAC), which is our network of technical experts, review the Concept Proposal for input on the validity and quality of the approach.
- If expert review does not indicate a likelihood of project success, then the project may be removed from further consideration in the process.

Step 4: Capacity Review

- If the TAC feedback supports the approach, then we next conduct a capacity review with the partner. This typically requires a meeting and includes assessment of the following:
 - o Discuss partner's ability to enter into contracts. Walk them through our typical Community Projects contract so they know what is involved.
 - o Partner shares grant management experience so we can get a sense of their capacity and need for support.
 - o Discuss potential contracts needed to complete the project and the partner's capacity to enter into and manage those contractors. Discuss shared approaches to managing contracts if needed.
 - o Review our invoice form with the partner.
 - o Review the format for the final report.
 - o Discuss match. Although matching funds are not required, proposals that have secured matching funds or in-kind donations (such as donated goods and services) will be stronger in the review process. If the partner expects to provide match, discuss a plan for documenting it over the course of the project.
 - o Discuss if the partner is able to work on a reimbursement basis.
 - o Note that this capacity review will not necessarily eliminate a potential applicant, but it allows staff to be better prepared to support and work with a partner.

Step 5: Project Approval

- Next, the Concept Proposal goes before the Bay Foundation and Executive Committee for their review, proposed changes, and approval. Staff shares recommendations on approving projects based on the capacity review, number and intensity of other active projects that require staff capacity, and TAC recommendations.

Step 6: Contracting

- If approved, then staff work with the applicant to develop the contract, scope of work, and schedule.
- Staff and applicant meet to finalize contract, review final report requirements, and review invoicing format.
- Partner organization signs the contract and work can commence.

Available Funding Amounts

We encourage projects needing funding in the range of \$2,000 to \$10,000. The annual budget for the Community Projects Program is \$15,000. The Estuary Program and review committees may choose to provide partial funding for any individual proposal.

Pertinent Dates

June to August: Interested applicants reach out to Estuary Program to discuss project ideas and develop a Concept Proposal.

September: Concept Proposals are due on the second Friday of September, by 4 p.m.

September to November: We prepare for the project approval step. The Bay Foundation and Executive Committee vote on the Concept Proposals at their November meetings. If funding is approved, staff contacts the partner and works with them to develop the final contract, scope of work, and budget.

December: Typically the contract is in place and work can commence.

December to February: If we award all of the funding for the year in the first round of application review, then no other applications will be solicited for that year. Another scenario might be that we receive numerous applications with potential in the first round, and staff would prefer to develop those submitted applications for the next round rather than soliciting additional applications. If all funding has not yet been awarded, we will reach out to potential partners to develop additional projects.

March: If we are accepting additional applications, Concept Proposals will be due on the second Friday of March, by 4 p.m.

March to May: We prepare for the project approval step. The Bay Foundation and Executive Committee vote on the concept proposals at their May meetings. If funding is approved, staff contacts the partner and works with them to develop the final contract, scope of work, and budget.

June: Typically the contract is in place and work can commence.

Application Review Criteria

The TAC and committees review applications based on the following criteria:

- Project goals and relevance to Management Plan and priority issues
- Community engagement

- Likelihood of success
- Urgency and timeliness
- Cost effectiveness while maximizing impacts
- Short-term and long-term benefits
- Public support and impact
- Regulatory feasibility
- Link to other projects

Strong projects that are more likely to be funded generally meet the following criteria:

- The project is impactful and has a broad reach.
- The project has a technically-sound approach.
- The project has the ability to be leveraged. In other words, the project lays a good foundation for future work.
- The project strongly supports the goals and actions of the Estuary Program's Management Plan.