EVALUATION OF EDKAAGMIK NBIIZH NEYAASHIINIGAMIINGNINWAG EDBENDAAGZIJIG TRUST (COLDWATER TRUST)

Presentation to the ENNET Trustees

July 9, 2021

Welcome and Land Acknowledge

- Warm welcome to everyone and thank you for this opportunity
- Land acknowledgement

Profile of Trust Activity
2013 - 2020

AREAS OF TRUST FUNDING
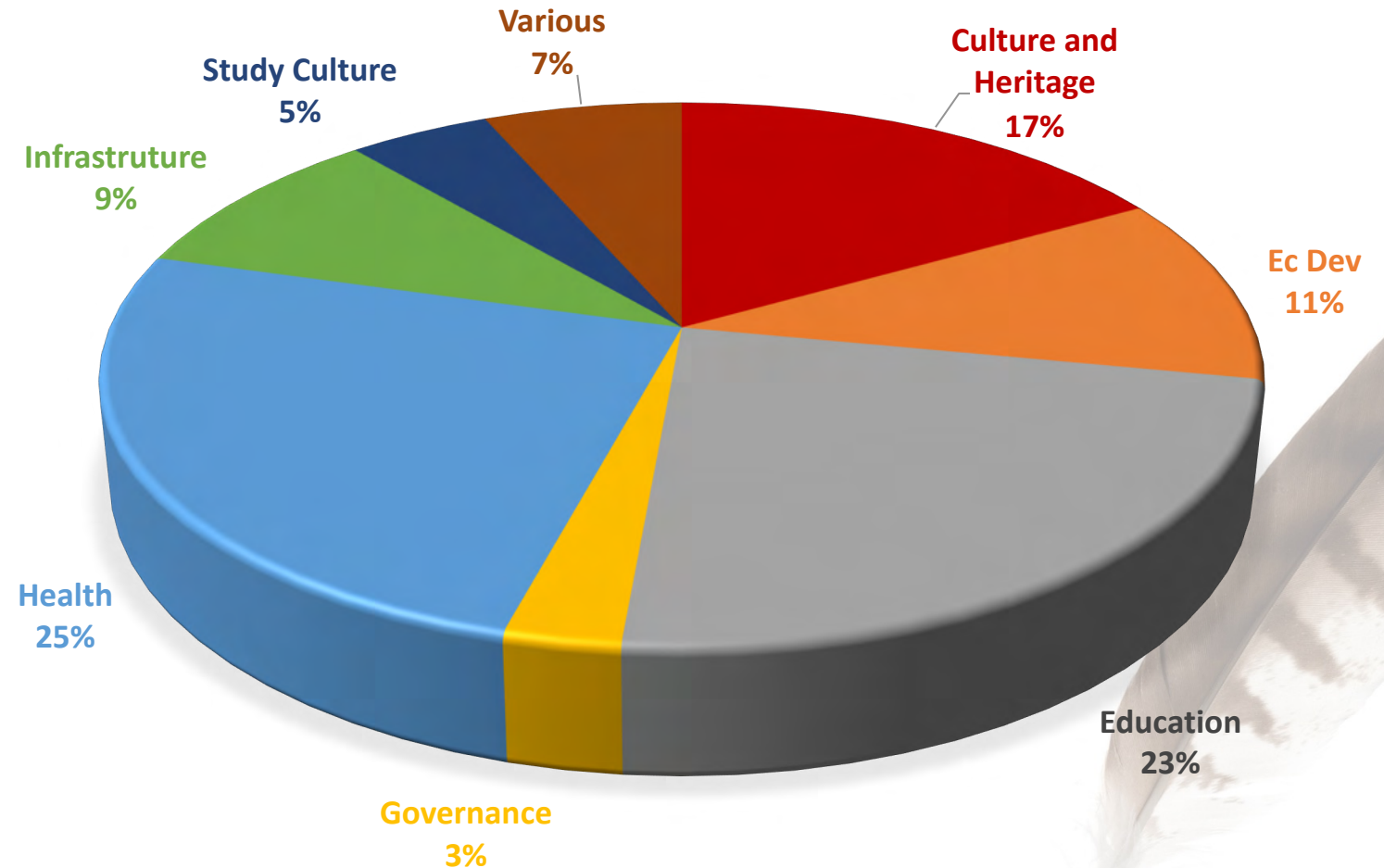
- Proposals Received: 144

- # of Projects Funded: 105
  1. Health
  2. Education
  3. Culture and Heritage

The areas funded align with areas required under the Agreement

Pie chart:
- Various 7%
- Study Culture 5%
- Infrastruture 9%
- Culture and Heritage 17%
- Ec Dev 11%
- Education 23%
- Governance 3%
- Health 25%

Note: A review of applicants for Trust funding between 2018 – 2020 indicates that approximately 53 people applied for a total of 80 projects that were funded.

Proportion of Funding Received by Key Areas Under the Agreement
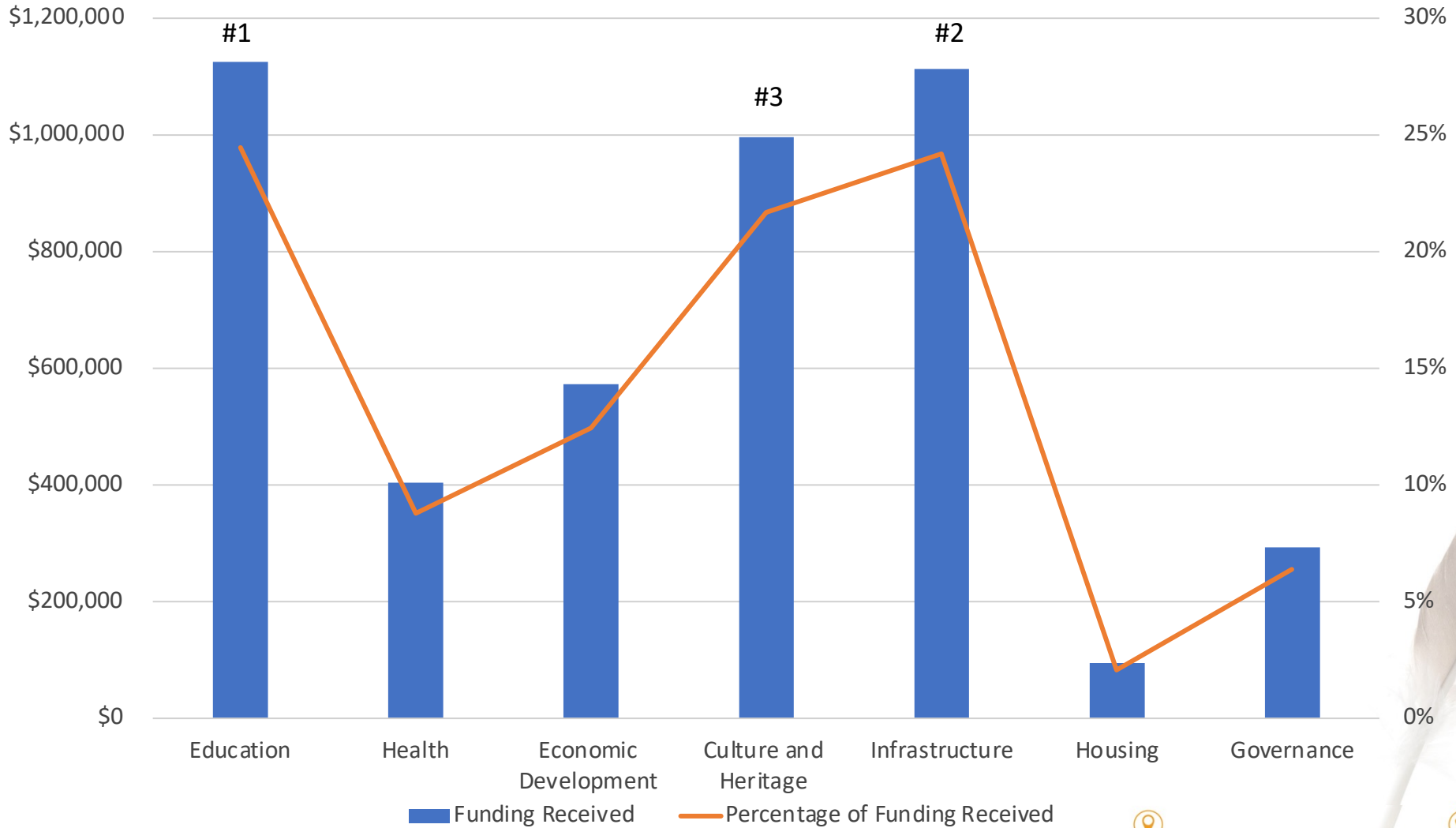
Profile of Trust Funding

|		
$1,124,961	Education*	21 projects funded
$ 404,026	Health	26 projects funded
$ 572,485	Economic Development	9 projects funded
$ 996,634	Culture and Heritage	33 projects funded
$1,113,093	Infrastructure	10 projects funded
$ 94,750	Housing	1 projects funded
$ 293,319	Governance	5 projects funded

$ 4,599,269 **TOTAL PROJECTS FUNDED**

$2,819,879 **Funding to Chief & Council**

$ 129,600 COVID Emergency Relief Cards in 2020 864

* includes 128 Student Sponsorships totalling $518,541 between 2014 – 2019

Trust Funding 2013 – 2020 – Projects vs. Chief and Council
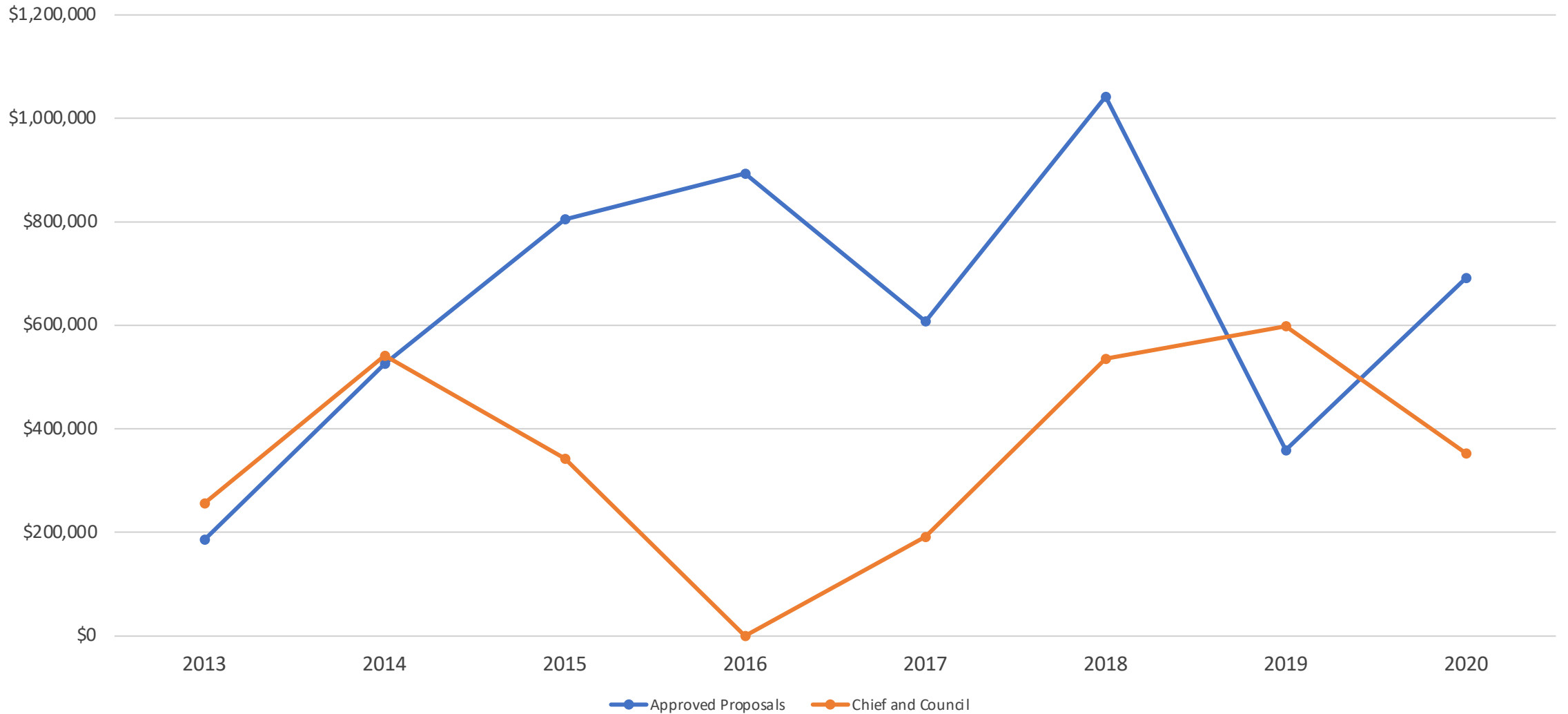
Discussion Questions

- Does the profile align with your understanding about the Trust funding activities?

- Is there a reason no funding has been released for land purchase?
  - Has the Trust received any proposals for land purchase?

- Our understanding is that the money that is transferred to the Chief and Council is transferred after the auditors have determined the actual interest earned by the Trust – roughly every April
  - Could this money not be transferred to pre-approved projects?

Comparator Review

Case Studies

- Bkejwanong Trust
  - Walpole First Nation

- Thunderbird Trust
  - The Chippewas of the Thames First Nation

- New Relationship Trust
  - Emerged from New Relationship vision agreed to by the Province of BC, the First Nations Summit, the Union of BC Indian Chiefs and the BC Assembly of First Nations

- Gwaii Trust Society
  - Haida Gwaii Communities

Comparators

- More ongoing and regular communication from the Trust
- Trusts all provide a number of supports to applicants including helping to complete the proposal
- All comparators have paid employee(s) to support administration, communications and engagement
  - Limit the % of administration costs paid by the Trust
  - Volunteer nature the ENNET Board limits capacity
- In order to have the greatest reach and impact, 2 Trusts have limits on how much can be paid to a proposal/project under the funding envelopes
- Two similar Trust were better able to predict funding to allocate to proposals
  - Earn it the first year and distribute before the end of the 2nd year
- Comparator Trust determine which projects to fund based on Community Plan or annual consultations with members on priorities
- Two Trusts set targets to ensure a proportion of the budget is approved for beneficiaries living outside the community

Bkejwanong Trust

What we learned:

- Once the audit is completed, the Trustees know how much money they can distribute. Funds are earned the first year and distributed the following year.

- Beneficiaries noted that they want to see the funds go to home repairs, such as fixing furnaces, roofs, etc.

- Out of 67 funded applications, 15 were off reserve. Off reserve funded projects were due to emergency need.

- Funds from the Trust are mostly focused on seniors.
    - Do not fund education –go to gov't or Casinorama

- A priority list for funding is developed yearly based on consultations with the Community.

- A guideline was developed to ease the application process.

- 2 newsletters distributed to houses on the First Nation every year.

Thunderbird Trust

What we learned:

- Two call outs per year on funding
- The Trust hosts community meetings when amendments are proposed, or to discuss emerging issues that may have an impact on the Trust.
- Separate applications for individual and group (Benevolent Fund)
- Bi-annual newsletter
- Online tutorials on how to access funds and how to fill out the application
- Workshops on how to complete an application
- Application process requires that proposed projects align with the Comprehensive Community Plan (CCP).
  - This was an important step – it makes people more aware of the Plan and community priorities.
- 1 paid staff

Gwaii Trust

What we learned:

- Community consultations performed and each area of funding (youth, education, economic development, the arts, community innovation, events etc.,) has a representative sitting on the Trust.

- There are separate proposal processes for each of the aforementioned areas.

- Communities don't trust each other so accountability and reporting is important
  - Claim sheet in Excel and use of an online Grant Management system
  - Budget and receipt reporting templates

- Conduct site visits for larger projects

- Have a requirement that there has to be an acknowledgement of funding over a certain amount, for examples: Plaques. However, this can be hard to enforce.

- Monthly projects updates on Facebook page

New Relationship Trust

What we learned:

- Consult with leadership each year and directly with each FN every 3 years
  - Key areas of discussion/questions include: Here's where the money is? Is what our programs are doing? Here's our investments? ? What should be the priorities? Should it continue to last over time

- Focused on funding projects

- High demand for educational supports
  - Set up a committee of Indigenous educators to review proposals

- For capacity building - priorities are those who haven't accessed the fund

- They have separate applications under each funding priority area
  - Application process very solid but **<u>not</u>** extensive. Overtime, NRT has reduced the scepticisms overtime based on demonstrating fairness, equity and accountability

- A criteria to getting funding is the obligation to provide a report
  - 10 % hold back until final report has been received

- Have a project funding map as a communications tool

Evaluation Findings
~ *Trust Composition* ~

Trust Composition

- As outlined in the Trust Agreement, the Trust is required to have a Board of 5 Trustees
  - Two are elected from the members on the Members List; two are appointed by Council from its members; and one is a Corporate Trustee.
- There is some desire by beneficiaries to have a different configuration of the Trust. Specifically:
  - Youth representation
  - Potential perceived conflict of interest of having two Trustees from the Council
    - This is likely attributed to the fact that a high percentage of Trust funding goes to the Chief and Council each year
- Volunteer nature of the Board limits the capacity of the Board to provide sufficient communication, outreach, training, support to beneficiaries and reporting on results
  - Trustees indicate that they do what they can but do not have capacity to do all the work necessary to ensure that the Trust is providing the greatest support to beneficiaries in accessing the Trust funds.

Discussion Questions

- Does the Trust have conflict of interest policy or guidelines for Trustees?

- What type of orientation is provided to new Trustees?

- Have the Trustees considered additional of new Trustees or delegated to the Trust? e.g., a youth delegate?

Evaluation Findings
~ *Implementation* ~

Understanding of the Trust

- Survey respondents indicated a lack of awareness of the Trust; how to apply for funding and/or what project have been funded by the Trust
  - Almost half of the survey respondents (44%) indicated that they were not aware of the Trust or had limited knowledge
    - **NOTE:** Approximately 58% of survey respondents live outside the community

- While the Trust is viewed as a blessing by Council members, they indicate that most members do not understand the history of the Trust nor that the Trust was set aside for all beneficiaries – both on and off reserve

- There is a sense among those consulted that the Trust is not accessible to off reserve beneficiaries

Proposal Process

- Generally, Trustees indicate that most members are challenged to complete the application process
  - Some members find it difficult to put together business plans and proposals
  - Many proposals are submitted last minute and often lack fully develop applications
- Of those respondents who have never applied for funding, the majority of respondents did not apply either because they were not aware of the Trust or not sure how
- Approx. 67% of those who applied but did not receive funding agreed that the funding application process was easy to complete
  - However, 45% of these respondent indicated they would need help in completing the application process in the future
- There is a desire by unfunded applicants to receive clearer communication as to why their proposal did not receive funding (and why others did)
- There is a desire for more than one deadline to submit proposals
  - minimum of 2 times a year
- Over time, the Trustees have developed a more empirical and objective process for reviewing proposals

Alignment with Community Priorities

- It is unclear how annual funding priorities under the Trust are determined
  - Recognizing the Trust Agreement is clear on what can be funded
- It is unclear how the Trust is aligned with the evolving priorities of the Nawash First Nation
  - Comparative review found that some First Nations engage with beneficiaries annual and/or use their Community Plan to drive the funding priorities for the Trust

Of those respondents who did not apply for funding, the majority of respondents did not apply either because they were not aware of the Trust or not sure how.

A further 20% indicated it was because they don't think they would receive funding

Why haven't you applied for funding from the Trust? (check all that apply)

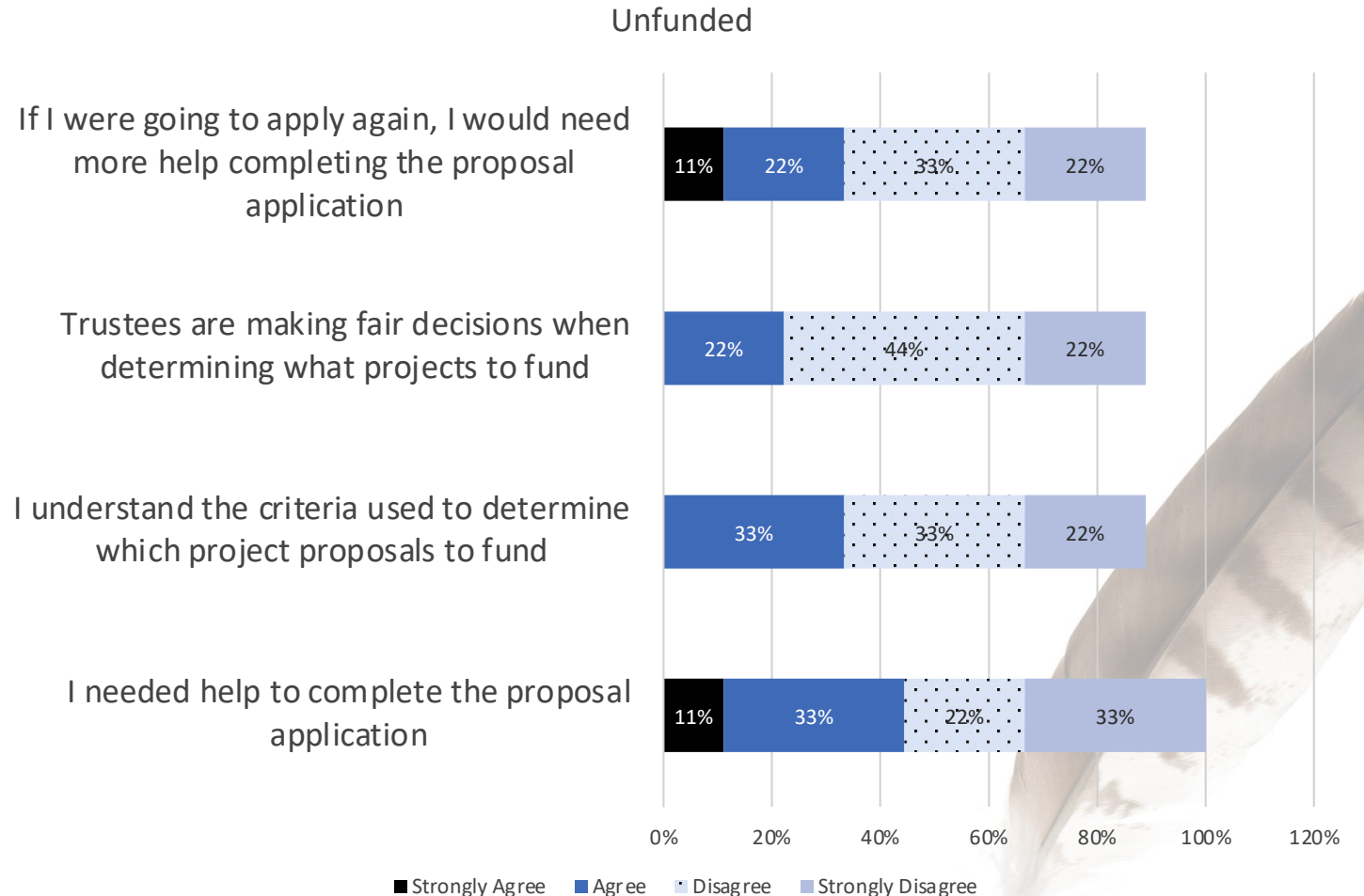| Category	Percentage
Not aware	40.00%
Not sure how	30.53%
Too complicated	3.16%
I don't have a project that requires funding	32.63%
I don't think I'd ever get funding from the Trust	20.00%
Do not know	7.37%
Please explain	9.47%

N = 95

Awareness of Funded Projects

Generally, respondents were most aware of the following projects funded by the Trust – but recognition level remains low:

- Covid relief gift card program
  - 47% were aware; 43% were not aware that this program was funded by the Trust

- Small business loans and grants program
  - 47% were aware; 35% were not aware that this program was funded by the Trust and the remainder were not aware of the program

- Nawash post-secondary assistance program
  - 43% were aware; 47% were not aware that this program was funded by the Trust and 10% were not aware of the program)

- Beyond these programs – at least 50% of respondents were not aware of the remaining projects in the survey question or not aware that the projects were funded by the Trust.
  - Over 75% of respondents were either unaware that the following projects were funded by the Trust: Native Child Welfare Program Comprehensive Review and Community Engagement; Right to Play; hiring additional personal support workers or housing projects under Habitat for Humanity and the addition and maintenance of the Maadookii Seniors Centre

Proposal Review Process

- Only 22% agreed that the decision was fair
- 33% agreed they understand the criteria used in making funding decisions
- Band Council Resolution – is not being used as intended
  - Opportunity to improve or remove this requirement

Unfunded

If I were going to apply again, I would need more help completing the proposal application
| 11% | 22% | 33% | 22% |

Trustees are making fair decisions when determining what projects to fund
| 22% | 44% | 22% |

I understand the criteria used to determine which project proposals to fund
| 33% | 33% | 22% |

I needed help to complete the proposal application
| 11% | 33% | 22% | 33% |

0% 20% 40% 60% 80% 100% 120%

■ Strongly Agree ■ Agree ⋮ Disagree ■ Strongly Disagree

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Communications and Engagement

- Interview consultations and a review of the Trust website found that the Trustees have invested a great deal in communications and outreach to the beneficiaries of the Trust.
    - Given the level of engagement and awareness it may not be effective
- Consultations with the Chief and Council indicate that, despite these outreach efforts, there continues to be a lot of misunderstanding about the Trust.
    - members do not understand the history of the Trust nor that the Trust was set aside for all members.
- Survey respondents indicated that more could be done to communicate about the Trust call for proposals; the projects funded and the outcomes from the funded projects. A multi-pronged approach to communication may increase overall effectiveness of the Trustees outreach activity.

Implementation of the Trust

- The Trust is operating as intended and outlined in the Trust Agreement
  - The project areas funded since 2013 align with the areas permitted to be funded under the Agreement
- Greatest amount of funding has been distributed to education, culture and heritage and infrastructure.
  - The only area where funding has not been provided is for the purchase of land for the benefit of the First Nations.
- Beneficiaries are generally agreement with the areas funded
  - There is a desire for more investments in education, youth programming, senior supports, while a number emphasized economic development – particularly for youth. Housing was also noted as an area where more investment is required.

Discussion Questions

- Why do you think there is such a lack of awareness about the Trust?

  - What more can be done to increase awareness?

- Do the Trustees see opportunities to simplify the application process?

- Should the Trustees try to align closer to the evolving priorities of the Nawash First Nation while continuing to respect the diverse needs of all beneficiaries?

  - Either through an annual engagement process or by aligning with the community plan?

Evaluation Findings
~ Achievement of Objective and Outcomes ~

Overview of ENNET Project Funding

Funded Area	Number of Projects Funded	Total Value of Projects Funded
Education*	21 projects	$1,124,961
Health	26 projects	$ 404,026
Economic Development	9 projects	$ 572,485
Culture and Heritage	33 projects	$ 996,634
Infrastructure	10 projects	$1,113,093
Housing	1 project	$ 94,750
Governance	5 projects	$ 293,319
TOTAL PROJECTS FUNDED		$ 4,599,269
Funding to Chief & Council		$2,819,879

* Includes 128 Student Sponsorships totalling $518,541

Achievement of Outcomes

- 85% of survey respondents strongly agreed/agreed they were having an impact on the community
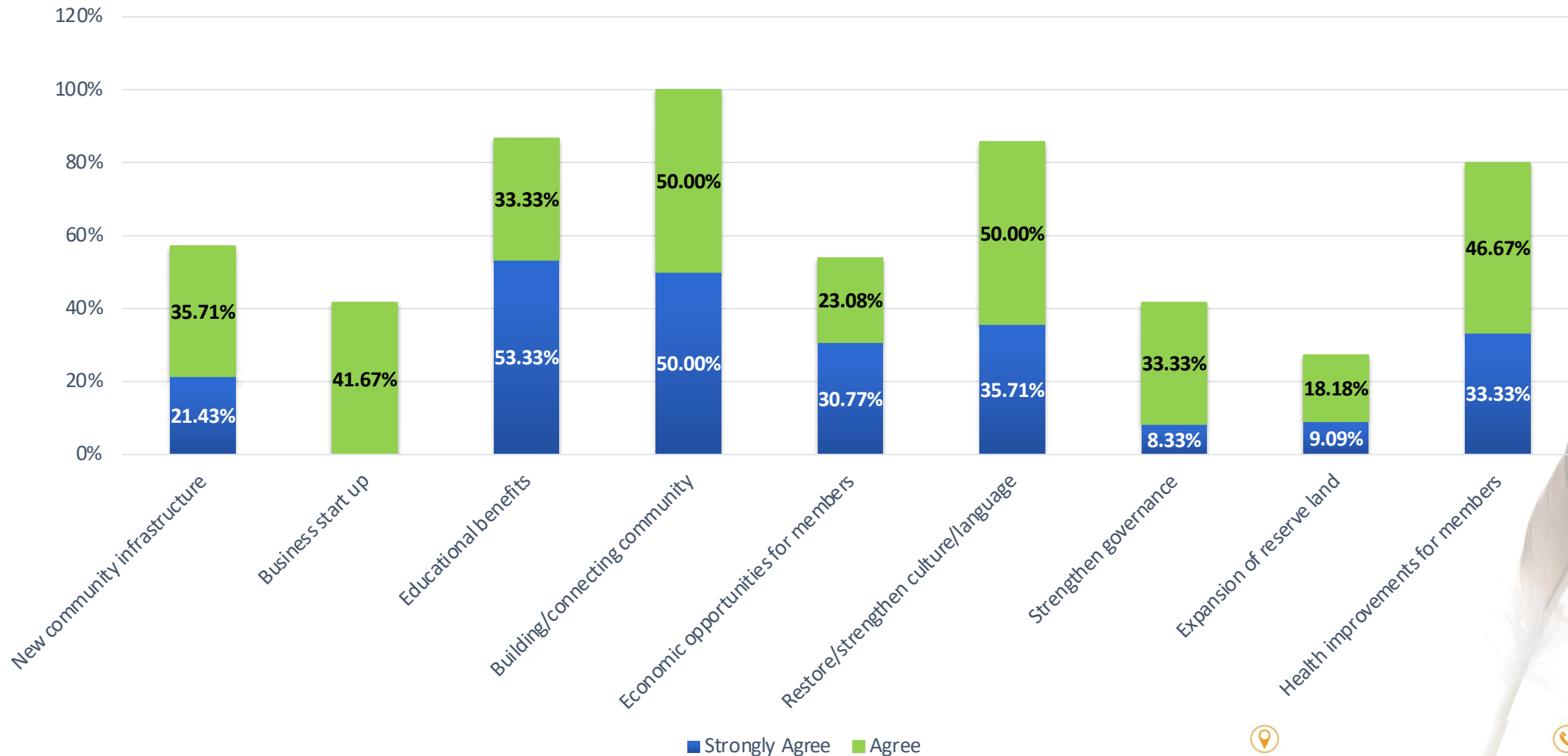
- 80% strongly agreed/agreed that the projects were having an impact on beneficiaries.

- However, only 51% of respondents indicated that the projects funded by the Trust were having an impact on them personally.

Impact of Trust Funding

Category	Strongly Agree	Agree
Trust funded projects have an impact on the community	19.44%	65.74%
Trust funded projects have an impact on beneficiaries	12.26%	67.92%
I have an equal opportunity to apply for Trust funding	11.93%	37.61%
Trust funded projects have an impact on me and my family	11.21%	39.25%

Strongly Agree Agree
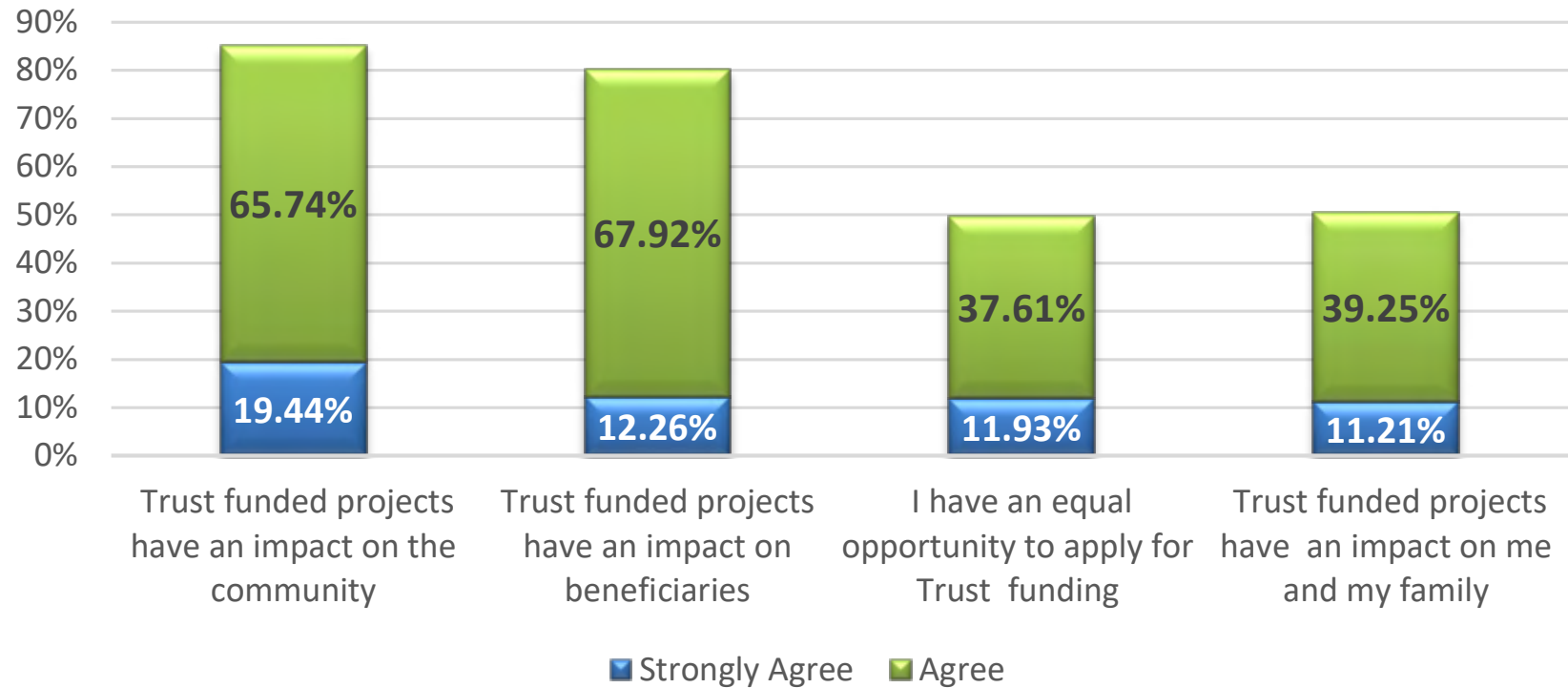
N = 110

Funding Recipients – Outcomes Achieved

Chart legend: ■ Strongly Agree ■ Agree

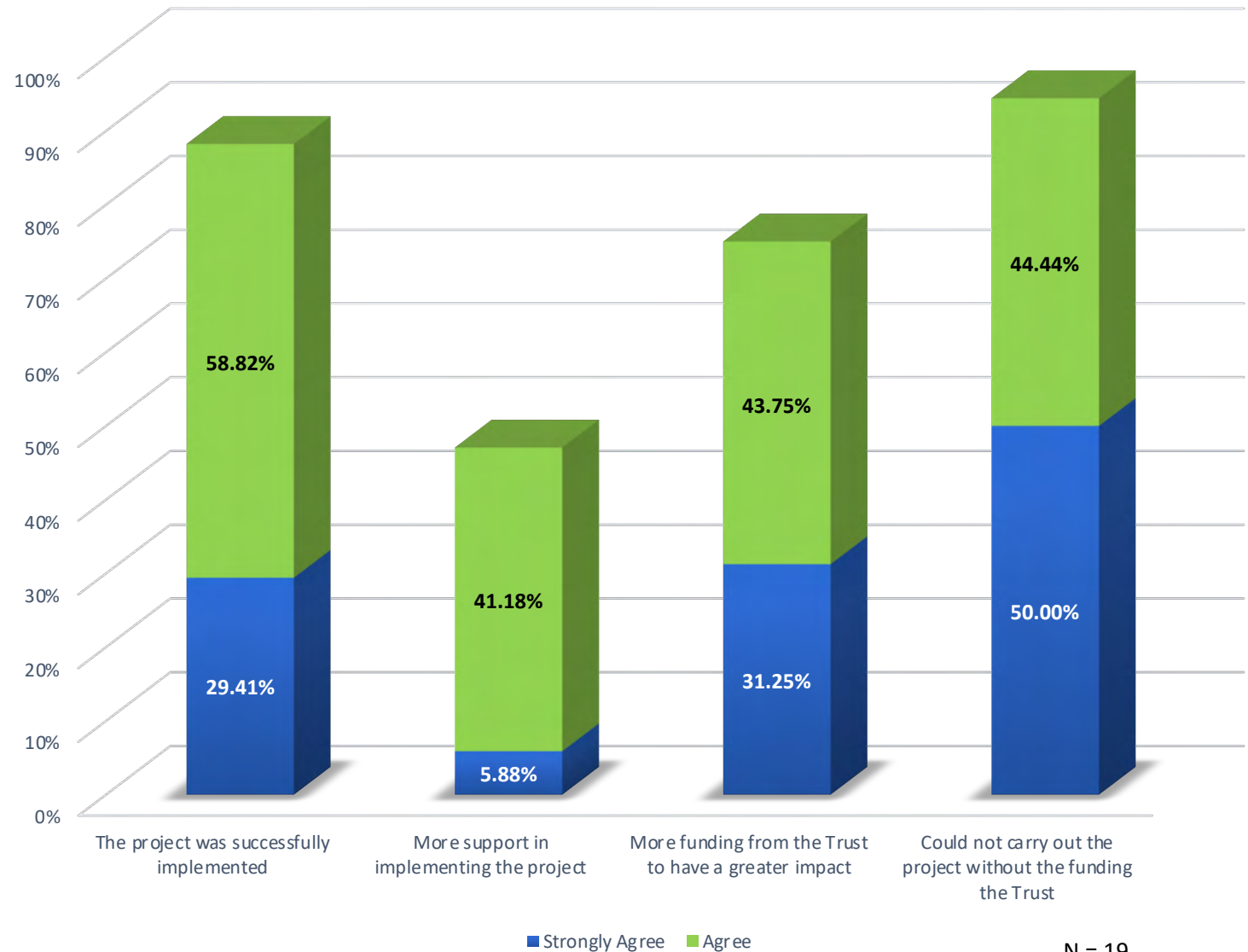| Category	Strongly Agree	Agree
New community infrastructure	21.43%	35.71%
Business start up		41.67%
Educational benefits	53.33%	33.33%
Building/connecting community	50.00%	50.00%
Economic opportunities for members	30.77%	23.08%
Restore/strengthen culture/language	35.71%	50.00%
Strengthen governance	8.33%	33.33%
Expansion of reserve land	9.09%	18.18%
Health improvements for members	33.33%	46.67%

N = 18

Achievement of Outcomes

- 94% of those who received funding from the project strongly agreed/agreed they wouldn't have been able to implement the projects without Trust funding.

- Almost 90% of funded respondents indicated that their project was implemented successfully.

- Approximately 75% of funded respondents indicated they could have used more funding in order to have greater impact.

Feedback from Beneficiaries who Received Trust Funding

The project was successfully implemented
- Agree: 58.82%
- Strongly Agree: 29.41%

More support in implementing the project
- Agree: 41.18%
- Strongly Agree: 5.88%

More funding from the Trust to have a greater impact
- Agree: 43.75%
- Strongly Agree: 31.25%

Could not carry out the project without the funding the Trust
- Agree: 44.44%
- Strongly Agree: 50.00%

■ Strongly Agree ■ Agree

N = 19

Reporting on Results

- There is support for more formal reporting to the Trust on results.
  - Support for this can be found in the Trust Application Handbook
- Given this direction and requirements to report results from previously Trust funded projects, the Trust should consider a formal reporting process for all based on:
  - Simple reporting template that can easily be collected in a data program
  - Differentiate reporting requirements based on type of project e.g., post-secondary program vs. infrastructure program
    - NOTE: Consider making future funding conditional upon receipt of outcome reports from previously funded projects
- Note: if the Trust decides to have outcome reporting, it needs to ensure it has the capacity to collect, analyze and report on the data

Evaluation Findings
~ Measuring Results ~

The Need for Formal Reporting

- As currently structured, the ENNET Trust does not require funded projects to report on the progress and results of the funded projects nor the impact on beneficiaries
  - The Trustees are missing an opportunity to understand and communicate the impact of the projects funded by the Trust.

- Interview consultations and survey respondents indicate support for increased reporting requirements for Trust funded projects

- The ENNET Trust Application Handbook already identifies requirements of funding applicants to report on the results from the Trust funded projects.

- Generally, it is a wise practice to instill a result-based approach in funding recipients and ensure they understand they are expected to report on results and impact on beneficiaries.

- Reports can be used at several strategic points in the funding cycle and for ensuring accountability to beneficiaries.
  - Critically, this iinformation can be used to determine which projects are having the greatest impact
    - This evidence should inform future decisions to distribute a higher proportion of the funds to the types of projects that deliver the greatest results to beneficiaries.

Discussion Questions

- Is there agreement that the Trustees should introduce a formal reporting process?
  - What are the risks of doing this?
  - Do you see the benefits?
- Is there a recognition that if the Trustees require reports, then they need to have capacity to analyze and report on the results more broadly?
- How can the Trustees ensure that all beneficiaries benefit from the Trust?

Evaluation Conclusions and Recommendations

Conclusion and Recommendations

- Based on the information and evidence collected, the evaluation concludes that the Trust is being implemented as intended and as outlined in the Agreement.

- The reach and the number of projects is significant, and the impact of the Trust perpetuates year-over-year as intended by the Trust ensuring long term benefits for the Nawash First Nation community and beneficiaries.

Trust Composition
- While the composition of the Board Trustees is consistent with the Agreement, there is some concern about the potential conflict of interest of some members as well as the need for additional Trustees.

Recommendation:
It is recommended that all Trustees, as part of their orientation, sign a conflict-of-interest form to help mitigate the risk of a perceived conflict of interest of Trustees. Trustees should also recuse themselves in reviewing proposals for which they may have a perceived conflict of interest.

It is recommended that the Trustees consider the appointment of a youth member to Board in order to bring the perspective of youth to the discussions.

Conclusion and Recommendations

Trustee Capacity

- The evaluation found a lack of capacity among Trustees to fully carry out current requirements of the Trust in a timely way. In addition, the evaluation has identified a number of areas where the Trust needs to invest more time to support the effective and more proactive operation of the Trust.

Recommendation:
It is recommended that the Trust appoint a paid staff member to support the operations of Trust. The level of effort required (part or full time) should be determined based on a thorough review of the requirements to fully support the operation of the Trust.

Beneficiary Capacity

- While the Trust has had an impact over the years, it is clear that the reach of the Trust is not as extensive as it could be. The majority of respondents indicated they did not apply for Trust funding because they were either unaware or unsure how to apply.

Recommendation:
It is recommended that the Trust develop more supports for applicants. These could include: YouTube instructional videos; simplified application processes; online and in-person training sessions; more information and open-houses using virtual platforms.

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Conclusion and Recommendations

Alignment

- While Trust Agreement clearly identifies the areas that can be funded, there is no indication as to how the proportion of funding is allocated annually to each area and whether it is driven by the Nawash First Nation priorities (as outlined in the Community Plan or otherwise). The evaluation found a desire among some survey respondents for greater community input into determining the annual funding priorities.

Recommendation:
It is recommended that the Trust engage the community annually to determine what should be the funding priorities for the coming 1 to 3 years. Not only will this provide another opportunity to engage the community in regards to the Trust – it will also provide the Trustees with greater insights that can help guide the evaluation and weighting of the funding proposals.

Consider engaging beneficiaries through townhalls (including virtual) to discuss and vote as to whether the Trust should fund a proposed large projects over $100,000.

Conclusion and Recommendations

Reach

- The Trust is primarily distributed to beneficiaries who live on the reserve and many of the respondents noted that the Trust does not benefit beneficiaries who live outside the Nawash First Nation

- Ultimately, the Trust is intended for all beneficiaries.

Recommendation:
It is recommended that the Trustees consult the beneficiaries to determine the percentage of funding that should go annually to beneficiaries living outside the Nawash community and under what categories. In this way it is possible to use the Trust to create more opportunities to engage, greater sense of community and belong regardless of where the beneficiaries live.

Conclusion and Recommendations

Proposal Process

- The evaluation indicates that the proposal process could be simplified, and more supports could be provided to beneficiaries/applicants.

- In addition, beneficiaries may benefit with more than one call for proposal annually

Recommendation:
It is recommended that the Trustees find ways to simplify the application process.

In addition, the Trustees should introduce two call for proposals per annum. This will provide better opportunities for beneficiaries to complete the required paperwork. In addition, this might provide the Trust with more flexibility to release funding after the Trust has been audited and final interest calculations are made.

Conclusion and Recommendations

Distribution of Funds

- The evaluation found a general desire for the majority of funding to go to proposed projects as opposed to Chief and Council.

Recommendation:
Given the time lag between the forecasting and actual determination of interests earned on the Trust, it is recommended that the Trust approve projects on two levels: Level 1 – which are funded based on forecasted interest and Level 2 – whose funding would be dependent on the final interest earned by the Trust in a year. Those projects with Level 2 approval which do not receive funding because of the final interests earned, would be approved for Level 1 funding in the next funding year. The Chief and Council would then receive any remaining surplus (which is expected to be significantly smaller).

Conclusion and Recommendations

Communications and Engagement

- It is generally recognized by those interviewed that beneficiaries are not actively engaged with the Trust. While the Trust has invested in communications and outreach, the evaluation findings indicate that the Trustees efforts have not led to significant increases in engagement and understanding of the Trust activities.

Recommendation:
Engage members annual on priority areas for funding under the Trust – ensuring alignment with the requirements of the Trust agreement. This will help to determine the proportion of funding allocated to each areas.

It is recommended that the Trustees invest in new approaches to communications and engagement including:
- Outreach regarding the call-for-proposals at least 3 months prior to the proposal deadline
- Conduct information and training sessions both in-person and virtually
- Promotional material available and posted in the community, websites and to the Facebook group
- Support the development of language videos to support Nishnaabemwin language acquisition for those who do not reside on the reserve
- Post information on what projects were awarded funds and details on the projects
- Monthly or quarterly newsletters that highlight Trust activity as well as putting a spotlight on a project and highlighting progress and outcomes.
- Plaques and signage should be required for all Trust funded projects in the community. This would include large infrastructure initiatives, facility upgrades, etc.

Conclusion and Recommendations

Reporting and Measuring Outcomes

- Currently there is a gap in information and evidence as to the results and outcomes achieved from the projects funded by the Trust. The evaluation has found strong support for requiring funded projects to formally report on results from their funded projects.

Recommendation:

It is recommended that the Trust fully implement a reporting requirement for all projects funded by the Trust. The level and complexity of the reporting requirements should be based on the amount of approved funding and level of risk associated with the funded project. For example, more detailed reporting should be required for large projects while short reports 1-2 pages for smaller amounts of funding such as for educational grants and scholarships.

Next Steps

- Finalize analysis of evaluation data/information

- Review evaluation findings with Trustees (today)

- Final evaluation report with recommendations submitted to the Trustees – mid-July 2021

Meegwetch!

We thank you for the opportunity to share the evaluation preliminary findings.

4-469 KOKOMIS INAMO, PIKWAKANAGAN, ONTARIO K0J 1X0   T 613.625.1441 F 613.625.1804   innovation7.ca