

Creating Effective Rural Advocacy and Rural Catalyst Development Organization(s)

Prepared for:

Southern Interior Beetle Action Coalition



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1 Introduction

1.1 Background

1.1.1 Overview

The Rural BC Project is an initiative to stimulate discussion and understanding of the challenges facing rural BC and the actions required to help rural BC communities succeed. There has been significant reference in the media over the past decade about the decline of rural Canada and the increasing urban-rural "divide". While rural BC and Canada does indeed face challenges, there are also significant opportunities. The Rural BC Project grew out of the highly successful Reversing the Tide initiative. The Reversing the Tide initiative included research, case studies and a major conference on rural economic revitalization held in Prince George in October 2008.

The Reversing the Tide initiative clearly identified that a pre-requisite to successful rural development and economic revitalization was the active involvement of rural communities in designing solutions to rural issues. It also highlighted the need for increased understanding of the mutual co-dependence of rural and urban economies. The Rural BC Project is about creating this dialogue. The intent of the Rural BC Project is to increase public awareness of the issues rural BC is facing in a constructive and politically non-partisan manner and to present a convincing case of the resources rural BC needs to meet these challenges. (OBAC 2013)

1.1.2 Recent Developments

With representation from the Southern Interior Beetle Action Coalition (SIBAC), Cariboo Chilcotin Beetle Action Coalition (CCBAC) and the Omenica Beetle Action Coalition (OBAC), the BC Project Steering Committee has been charged with moving forward on the initial initiatives of the Rural BC Project. To this end, in December 2012 and March 2013, the BC Project Steering Committee met with elected officials from the Provincial Government to present and discuss the recommendations outlined in the Rural BC Project.

Two of the recommendations included the creation of a Rural Advocacy Group and the creation of Rural Catalyst Organization(s). To the Rural BC Project Steering Committee a Rural Advocacy Group refers to an organization whose core mandate would be to actively "advocate" for rural communities and rural policy development. Such an organization would need to be engaged with the federal and provincial governments and would develop and actively promote policy advice to the two senior levels of government for policy and regulatory changes that they felt were needed to provide greater support to rural communities in the province.

The BC Project Steering Committee defines “Rural Catalyst” Organization(s) as organizations that are expressly created to focus on actions that facilitates rural development.

1.2 Report Purpose

During the meetings with elected members of the Provincial Government the provincial politicians asked the Rural BC Project Steering Committee to provide more detail on the Rural Advocacy Group and Rural Catalyst Organization(s) recommendations including:

- Demonstrating why these Groups are needed;
- The types of activities these organizations would undertake; and,
- How these recommended organizations would relate to existing organizations in BC.

As noted above, the Rural BC Project recommendations were developed based on the significant background research completed by the three Beetle Action Coalitions independently; through the Reversing the Tide Initiative, and through the discussions and research of the Rural BC Project itself. In addition to the background papers completed specifically for the Rural BC Project, the recommendations of the Rural BC Project and this paper also builds upon the significant previous research completed by the three Beetle Action Coalitions including:

- 1) “Exploring the Creation of Successful Rural Development” Peak Solutions Consulting Inc. February 2013
- 2) “Exploring the Creation of Successful Regional Development” Peak Solutions Consulting Inc. 2013.
- 3) “Revitalizing Rural BC: Some Lessons from Rural America” Mark Drabenstott. 2009.
- 4) “Key Findings from 20 Years of Canadian Rural Research” Bill Reimer. 2009.
- 5) “Public Investment in Rural and Resource Regions as a Strategic Development Tool: Towards a New Era for BC” Thomas Hutton. 2008.
- 6) “Regional and Rural Economic Development: Review of Delivery and Public Investment Models”. Peak Solutions Consulting Inc. 2008.

2 Characteristics of Successful Rural Advocacy Organizations

2.1 Rural BC Project Recommendations

The Rural BC Project included the recommendations for the creation of both a “political” rural advocate – through the designation of a senior Cabinet Minister responsible for rural development – and the creation of a non-governmental rural advocacy organization.

The Rural BC Project recommended that the Provincial Government designate a senior Cabinet Minister responsible for rural development as a concrete indication of the government’s acknowledgment of the unique challenges and opportunities faced by rural communities. Several other Canadian jurisdictions have – or had – a provincial Cabinet Minister with rural development in their title often supported by a small rural development staff unit. In BC, this has happened only once with the short-lived title of the Ministry of Community and Rural Development.

2.2 Successful Rural Advocacy Organization

Non-governmental rural advocacy organizations also play a significant role in assisting with rural development in other jurisdictions. These organizations provide a critical function as independent organizations that can advocate for rural regions and communities without fear of reprisals for being perceived as criticizing current governments or their operations. Based on observations of the rural advocacy organizations reviewed for this paper the following are highlighted as characteristics of successful rural advocacy organizations:

- 1) Mission based and singularly **focussed** - most successful rural advocacy organizations are created and focussed solely on rural development issues.
- 2) Independent and non-politically aligned – To be effective in rural advocacy, the rural advocacy organization needs to be independent and non-politically aligned. In particular, it could be problematic for rural advocacy organizations to be dependent upon funding from the government’s they are attempting to influence and upon who’s policies they may be commenting.
- 3) Provide rigorous, quality policy analysis and advice on rural issues – of the rural advocacy organizations reviewed all provide rigorous and quality policy analysis of rural issues and all provide rural policy advice to senior levels of government. This includes making timely presentations to relevant decision-making bodies on key rural issues.
- 4) Formally connected to rural communities and leaders – for rural advocacy organizations to be effective they must be formally connected in some way to rural communities and

rural leaders to ensure a true understanding of – and focus on – key rural issues and approaches.

- 5) Well developed and effective communication resources and tools – given the broadly dispersed nature of the constituency they serve, it is critical that rural advocacy organizations have well developed and effective communication resources and tools so that rural communities have easy access to their information and resources.

3 Characteristics of Successful Rural Catalyst/Development Organizations

3.1 Rural BC Project Recommendation

The Rural BC Project also recommended the creation of one or more rural catalyst/development organizations in BC. This recommendation flows from the background research completed by the Beetle Action Coalitions. In the US and parts of western Europe rural catalyst/development organizations have been very effective in facilitating rural economic revitalization. As demonstrated by the organizations highlighted in Appendix B the spectrum of services offered by rural catalyst/development organizations tend to extend from those primarily offering only rural leadership development training and rural facilitation services (e.g., Rural Development Initiatives Inc in Oregon) to larger “full service” rural development organizations (e.g., Kentucky Highlands Investment Corporation).

3.2 Key Characteristics

The key characteristics of successful rural catalyst/development organizations include:

- 1) A clear and singular focus on **rural** development – these organizations are mission-based and typically focussed on facilitating **rural** development as opposed to community or regional economic development. That is they focus on serving many rural communities or a depressed rural region. The key issue to understand here is that these organizations are formed to address specific rural issues – rural development is not a side-line or subsidiary issue or focus to their core function.
- 2) Provide direct assistance and support to rural communities – another key characteristic of these organizations is that they focus on providing direct rural development support and programming that assists rural communities and regions as opposed to simply researching rural issues.
- 3) Have stable, multi-year funding in place – the most effective rural catalyst/development organizations have stable multi-year funding so they can focus on offering multi-year support to rural communities and not spend time constantly chasing program or administration funding.
- 4) Include a range of rural development tools with the most successful rural development organizations being the larger organizations that have the capacity to offer a suite of rural development supports (leadership training, entrepreneurial development, workforce training, business development, investment funds, etc.) to their rural communities. This

allows these rural development organizations to strategically integrate the various elements required for successful rural development and also attract experienced work team.

- 5) Active Partner Involvement of First Nation and Rural Communities – As noted in the background papers of rural BC Project any rural development in BC needs to include the active involvement and partnerships of neighbouring First Nations. In addition, successful rural development organizations are closely connected in their planning and implementation approaches to the rural communities they are working in partnership with.

4 Summary

4.1 BC Situation

While there are organizations in British Columbia that undertake some of the components of a rural advocacy function – it could well be argued that no organization in British Columbia is currently filling a complete and dedicated non-governmental rural advocacy function. To a certain extent, the Beetle Action Coalitions (BACs) through their sponsorship and leading of the Rural BC Project are playing a rural advocacy function.

In addition, the while the Union of BC Municipalities has produced reports and resolutions that reflect rural advocacy positions – the UBCM only represents local governments and focuses on both urban and rural local government issues and does not carry forward First Nation issues or positions. Likewise there are several First Nations organizations (e.g., Union of BC Indian Chiefs and BC Assembly of First Nations) that represent collective First Nation's issues but these too are not solely focused on rural issues and do not speak to rural municipal issues.

Existing organizations in BC, like the Rural BC Network, UNBC's Community Development Institute, and Selkirk College's Rural Development Institute provide useful information resources and research services of relevance to rural communities. However, none of these organizations currently provides the type of dedicated and focussed rural policy analysis and rural advocacy role of organization's like the Rural Ontario Institute or the Center for Rural Affairs in Nebraska. In addition, many rural advocacy organizations have board structures that formally connect them to leadership in rural areas.

Similarly, although there are various organizations that offer assistance to rural communities (e.g., Community Futures Development Corporations, local economic development offices and Destination Marketing Organizations for Tourism) the focus is usually on specific programs (Community Futures) or are somewhat challenged for First Nation and rural communities may lack the resources to effectively leverage services in a manner larger communities are capable (Destination Marketing Organizations) or in the case of local economic development offices may not exist at all if community is too small to afford funding.

This is different than dedicated rural development organizations like the Rural Development Initiatives Inc in Oregon; Maine Coastal Enterprise Inc.; or Rural Action Ohio where programming and services can be applied to the specific rural client communities or region on a continues and on-going basis.

4.2 Uniqueness of Rural

As demonstrated by many of the organizations profiled in this report **rural** development is different than community economic development. Rural development organizations typically focus their work on smaller communities and unincorporated areas where there is less capacity to participate in economic implementation activities. Specifically, they typically provide specialized expertise and services that may not exist in the rural setting they serve. They often provide services to population that can be wide-spread geographically and often operate at a regional scale, often this is required not only to achieve population and business thresholds but also to achieve operating economies of scale. In addition, it is recognize that rural development goes beyond simply economic development issues but also address other rural quality of life and livability challenges and issues faced in rural areas.

Again, the three Beetle Action Coalitions – and other organizations like the regional trusts – have at times acted like rural catalyst development organizations. For example, BAC and Trust fund projects like the Bridges II Project, Wood Waste to Rural Heat Project, and the rural community internship programs provide much needed specialized expertise and additional resources to rural communities. Indeed, in terms of economic development, often there is funding available. What is needed at times is an organization that is capable of providing the rural development catalyst support role to guide or undertake planning, organize and deliver effect rural programing.

Finally, the organization's reviewed for this paper clearly demonstrated the utility and benefits of dedicated non-governmental rural advocacy organizations and rural development catalyst organizations. While there are component pieces of both functions active in BC there simply are not the types of dedicated and focussed rural advocacy and rural development catalyst organizations present in other jurisdictions.

Appendix A – Examples of Rural Advocacy Organizations

A-1 Overview of Rural Ontario Institute

A.1.1 Focus

Vision

Building Vision, Voice and Leadership for a strong and vibrant rural Ontario (ROI 2013).

Mission

Developing leaders, initiating dialogue, supporting collaboration, and promoting action on issues and opportunities facing rural Ontario (ROI 2013).

A.1.2 Background and Accountability

History

Rural Ontario Institute (ROI) was incorporated on April 1, 2010 as a charitable organization. It was formed out of a merger between The Ontario Rural Council (TORC) and The Centre for Rural Leadership in that year. TORC was formed in 1998 and served as a catalyst for dialogue, collaboration and advocacy in support of Ontario's rural communities (TORC. nd). The Centre for Rural Leadership emerged in 2001 to offer agricultural and rural leadership programming. The concept for The Centre for Rural Leadership arose from the Agricultural Leadership Program (AALP), one of the longest running agricultural leadership development programs in the world. (The Centre for Rural Leadership. 2002)

Governance Structure

The Rural Ontario Institute is governed by a 12 member volunteer Board of Directors. In addition, there are ex-officio representatives appointed annually as determined and invited by the Board of Directors.

Service Area

ROI provides service throughout rural Ontario and focuses on growth and development among Ontario's agriculture and rural sectors. The head office for ROI is located in Guelph, Ontario.

A.1.3 Structure, Activities and Resources

Organizational Structure

Supporting the efforts of the board and delivering ROI's program is a staff of five. In addition, ROI relies on a network of partnerships to fulfill its mandate. Currently, ROI has organizational memberships in the following: Canadian Society of Association Executives(CSAE), Economic Developers Council of Ontario(EDCO), Ontario Association of Community Futures Development Corporations(OACFDC), Ontario Agricultural Hall of Fame Association(OAHFA), Ontario Nonprofit Network(ONN), International Association of Programs for Agricultural Leadership(IAPAL), and the Canadian Rural Research Network(CRRN). (ROI, 2013)

Key Programs and Operational Activities

The ROI undertakes four programs with a focus on leadership training. These programs include:

- **Advanced Agriculture Leadership Program (AALP)**- Established in 1984, the AALP is an executive development program for men and women who want to broaden their horizons and expand their networks to help shape the future of the agriculture and food sectors in Ontario. Using a series of seminars and travel opportunities, AALP participants develop leadership skills, an increased knowledge of the agri-food system, and perspectives on critical issues in the industry.
- **Steps to Leadership** - The need for leadership and capacity building in rural Ontario is growing. Steps to Leadership involves programming and resource tools aimed at significantly boosting leadership skills and capacity for agricultural and rural organizations and communities across Ontario.
- **Personal Leadership and Organization Development Workshops and seminars** - offered by, or coordinated through the Rural Ontario Institute. These workshops and seminars are directed at individuals, organizations, stakeholder and rural residents across Ontario. As a catalyst for dialogue, collaboration and action on issues facing rural Ontario while delivering leadership training and development, these workshops assist individuals and organizations across Ontario's agriculture, agri-food and rural sectors to move forward and grow while ensuring that rural Ontario contributes to a healthy vibrant province.
- **Webinars** – Each year ROI offers a series of webinars focused on leadership related topics and targeted at rural Ontario. (ROI. 2013a)

ROI also disseminates information on relevant topics including research and reports focused on:

- Rural Ontario Issues;
- Environmental resources;
- Society resources; and,
- Economic resources.

While not a program, a key function at ROI is the role played by the Government Relations Committee. This Committee provides recommendations regarding government relations policy, strategies and actions to the Board of Directors. This committee is focused on relationships with elected officials and government staff at all levels of government. It also supports ROI Board members in their government relation efforts through the provision of resources and training. (ROI. 2012)

Annual Budget and Funding Sources

In 2013, ROI had revenue of just over \$1.11 million, this was down slightly from revenue of \$1.32 million in 2012. The major sources of revenue in 2013 included: Grants and contributions (\$0.66 million), sponsorships (\$0.17 million), tuition (\$0.12 million), and training and business development (\$0.12 million). The provincial government is a major funding partner with numerous organizations contributing funding from farm associations, business, and the University of Guelph. In addition, ROI benefits from four restricted funds; Leadership Legacy Fund, W.G. Weston Foundation Fund, K. McKinnon Memorial Fund, and the WM.A Stewart Endowment Fund. (ROI nd.)



A-2 Overview of Rural Policy and Research Institute (RUPRI)

A.2.1 Focus

Vision

- Rural people and places have the resources and capacities to create strong, viable, meaningful, and sustainable futures that can both withstand and turn to advantage the forces of globalization and economic, demographic, and social change.
- Rural and urban people find common cause and understanding about the future role and governance of rural places and the contribution that rural life and culture makes to national identity. (RUPRI 2013)

Mission

- Provide unbiased analysis and information on the challenges, needs, and opportunities facing rural America.
- Spur public dialogue and help policymakers understand the impacts of public policies and programs on rural people and places. (RUPRI 2013)

A.2.2 Background, Accountability and Service Area

History

Rural Policy and Research Institute (RUPRI) was founded in 1990 to address concerns of the Senate Agricultural Committee that no objective non-governmental source of external data, information, and analysis, regarding the rural and community impacts of public policy decisions was available. (RUPRI. 2013)

Governance Structure

RUPRI has a National Advisory Board made up of 27 members from across the United States. Board members come from a variety of backgrounds including academia, business, and rural development organizations. (RUPRI 2013)



Service Area

RUPRI's reach is national and international with expertise and perspective on policies impacting rural places and people (RUPRI. 2013). While there are international projects, the focus is primarily on the rural United States.

A.2.3 Structure, Activities and Resources

Organizational Structure

RUPRI's work is conducted through a small core team based in Missouri, Washington DC, and Texas, and through four national centers and a number of joint initiatives and panels located across the United States. The four national centers that support the RUPRI mission each focus on a specific sector, including:

- **RUPRI Center for Rural Health Policy Analysis** – located at the University of Nebraska Medical Center in Omaha, NE, conducts original and contract research to better inform public policy on rural health care.
- **RUPRI Center for Rural Entrepreneurship** - located in Lincoln, NE, Chapel Hill, NC, and Columbia, MO, focus on information for policymakers, practitioners, and communities in support of rural entrepreneurship.
- **RUPRI Rural Poverty Research Center** - located jointly at Oregon State University and the University of Missouri, focuses on the causes and consequences of rural poverty and on effective policy responses.
- **RUPRI Center for Regional Competitiveness** - located in Kansas City, MO, develops economic indicators for understanding regional competitiveness, provides tools and strategies for diagnosing and seizing competitive advantage, and analyzing impacts of public policy on regional competitiveness. (RUPRI. 2013)

In addition, RUPRI partners with other organizations in several collaborative ventures including:

- **Rural Assistance Center** - based in Grand Forks, ND, is a joint initiative of the Office of Rural Health Policy at the U.S. Department of Health & Human Services, the Center for Rural Health at the University of North Dakota with RUPRI serving as an information portal to assist access the full range of programs, funding, and research to support the provision of quality health and human services to rural people.
- RUPRI collaborates with several partners on the **importance of rural community colleges** to rural economic and community development.
- **The International Trade Initiative** - a joint venture with the Harrison Institute at the Georgetown University Law Center, provides legal and analytical support on the rural differential impacts of domestic and international trade decisions.



From time to time, RUPRI convenes panels of experts to inform public policymaking in specific sectors, including health, human services, and telecommunications. RUPRI also facilitates networks of scholars and practitioners including:

- **The Community Policy Analysis Network (CPAN)** - a national network of researchers who collaborate on building predictive models and tools to support better informed state and community policymaking.
- **The National Rural Network** - brings together national non-governmental organizations with a vital interest in the impacts pm rural public policy. (RUPRI. 2013)

Key Programs and Operational Activities

In general, RUPRI's activities encompass research, policy analysis and engagement, dissemination and outreach, and decision support tools with the work of the centers, ventures, panels, and networks outlined above, supported and complemented by five cross-cutting core programs. The core program areas include:

- **National Policy** - based in Washington DC and provides the interface between the work across the RUPRI organization and Congress and the Administration. Specially, this office facilitates the National Rural Network and a multitude of rural health and human services initiatives, including staffing for the RUPRI Rural Health Panel's Washington, DC activities.
- **State Policy** - centered in Austin, TX encourages and enables state policymakers to develop intentional and informed state rural policies. The focus of RUPRI's State Policy Programs is state-level policies and programs that have broad (i.e., not sector-specific) impact.
- **International Activities** - encourage international exchanges of ideas, opportunities, and experiences in rural development among policymakers, academics, and practitioners.
- **Community Information Resource Center** - located in Columbia, MO, uses data mapping and management to enable the "place-based" implications of issues impacting rural America to be more effectively visualized, analyzed, queried and mapped.
- **Rural Governance** is concerned with how decisions are made that impact the lives and prospects of rural people and communities. (RUPRI. 2013)

Annual Budget and Funding Sources

The core funding for RUPRI comes from the Office of the Chief Economist within the US Department of Agriculture. This amount varies and is supplemented from a variety of other



funding sources including; other federal government departments, research grants, Foundation Funding, and one-off funding for individual projects. (Miller, K. 2013)



A-3 Overview of Heartland Center for Leadership Development

A.3.1 Focus

Vision

The Heartland Center for Leadership Development (Heartland Center) is an independent, non-profit organization developing local leadership that responds to the challenges of the future of small towns and rural communities. (Wall. 2013. Pers. comm.)

Mission

Same as the vision statement.

A.3.2 Background, Accountability and Service Area

History

Based in Nebraska, the Heartland Center was organized in 1985 by a group of Great Plains leaders as an outgrowth of Visions from the Heartland, a grassroots futures project. Today, the Center is known throughout North America for its field research on *Clues to Community Survival* and for its hands-on programs in community leadership development. (Heartland Center 2013)

Governance Structure

The Center is governed by a Board of Directors consisting of 10 members from around the United States who are experts in leadership and community development (Heartland Center 2013).

Service Area

The Center is located in Nebraska and works across the United States and has also done work in Canada. The Center has recently done work in Alberta and Saskatchewan. In British Columbia the Center has worked with First Nations in Prince Rupert and for the Center for Innovation and Entrepreneurship. (Wall 2013 pers comm.)



A.3.2 Structure, Activities and Resources

Organizational Structure

The Heartland Center is an independent, non-profit organization developing local leadership that responds to the challenges of the future of small towns and rural communities. Heartland Center has a staff of nine, focused on delivering their portfolio of programs. Each year the Heartland Center works with almost 2,500 leaders, citizens and practitioners from 300 communities nationwide. (Heartland Center 2013)

Key Programs and Operational Activities

With a collection of staff and associates experienced in facilitating community leaders and practitioners, the Heartland Center offers support that will help rural communities visualize, organize and mobilize their community or organization for action. Specific training areas include:

- **Leadership Training** – Working to build the capacity for a diverse and inclusive leadership base that is a key ingredient to community and organizational success.
- **Community Development** – Provides to capacity building programs for community leaders, and is also recognized as an innovator of creative ideas for community revitalization. Also provides formal program evaluations and does neighbourhood training in larger communities.
- **Public Participation** – Provides facilitation services for public participation processes.
- **Strategic Planning** – has developed effective citizen participation efforts such as visioning, consensus building, public meetings, and other awareness and education events. In addition to traditional methods such as SWOT analysis, needs assessment and asset mapping, it also utilizes Appreciative Inquiry techniques, which stress a holistic approach.
- **Training for Practitioners** – Provide several training programs to help practitioners be more effective and gain more personal satisfaction from their work.
- **Clues to Rural Community Survival** – As a workshop component, “20 Clues to Rural Community Survival” is one of the Heartland Center’s most popular and effective training tools. The list of vital characteristics provides an “ideal” benchmark against which people can measure their own community.

The Heartland Center also offers a webinar series on a variety of topics and has an on-line publication centre where topical books can be purchased. (Heartland Center. 2013)

Annual Budget and Funding Sources

The Heartland Center operates on a budget of approximately \$400,000 US to \$500,000 US annually. Approximately half the Center’s funding comes from fee for service contracts while the other half comes from grants. Grant funding is derived from a variety of Foundation funders



and the federal government, primarily through the US Department of Agriculture. (Wall 2013 pers comm)

A-4 Overview of Center for Rural Affairs

A.4.1 Focus

Vision

A leading force engaging people and ideas in building a better future for rural America." We actually aspire to be "the" leading force! (Powell. 2013 pers. comm.).

Mission

Establish strong rural communities, social and economic justice, environmental stewardship, and genuine opportunity for all while engaging people in decisions that affect their lives and the future of their communities.

A.4.2 Background and Accountability

History

The Center was founded in 1973 and focused on getting federal policy to work for rural Americans. The organization initially started in a storefront in Nebraska.

Governance Structure

The board of directors consists of between 12 and 24 members that govern the Center. Members of the board serve staggered three-year terms. The board determines policy and overall direction of the organization at quarterly meetings.

An executive committee consisting of the president, vice-president, secretary, treasurer, and three members elected by the board meets in conjunction with regular board meetings. In addition, the board establishes oversight committees to counsel staff on the implementation of the Center's various programs. About one-half of the board is farmers or ranchers. Others are small town business and working people including a small number of urban members with a strong interest in rural improvement.

Service Area

The business loans programs are focused on Nebraska, but the other program targets Montana and the Great Plain States (North Dakota, South Dakota, Kansas, Oklahoma). The Center's policy and advocacy work is National in scope.(Powell. 2013 pers. comm.)



CENTER *for* RURAL AFFAIRS

A.4.3 Structure, Activities and Resources

Organizational Structure

The Center has thirty-three staff distributed among four departments including:

- Policy programs
- Rural Opportunities and Stewardship programs;
- Rural Enterprise and Assistance programs (REAP); and
- Administration, Communications and Development. (Center for Rural Affairs 2013)

Key Programs and Operational Activities

The Center offers two **small business** programs including:

- **Rural Enterprise Assistance Project (REAP)** is committed to strengthening rural communities through small, self-employed business development. The Center offers four essential services: financing (micro loans), business training, technical assistance, and networking. Through REAP you can also take part in the Center's Business Boot Camp training.
- **Nebraska MarketPlace 2014** is the 8th Annual Nebraska MarketPlace, Nebraska's premier event focused on energizing and connect entrepreneurs, small business owners, service providers and communities in a local exhibitor tradeshow.

The Center provides services under its **small towns** programming that includes:

- **Community Development** - The Center for Rural Affairs focuses on providing:
 - Accessing Much Needed Resources
 - Learning to Lead Others
 - Helping to Have a Direct Influence in Policy
 - Starting Creative and Innovative Community Projects
 - Encouraging Youth to Live and Work in Rural Areas
 - Developing a Vision for the Community
 - Starting New Ventures within the Community
 - Building Support for the Area and Community
- **Community Food Systems** – The Center works with rural communities to build healthy, sustainable, local food systems by:
 - Supporting Farmers markets
 - Community gardens
 - Farm to school – a program to bring more local food into local schools.
- **Saving the Small Town Grocery Store** – A program to highlight the importance of the local grocery store in small towns and exploring solutions to saving them.



CENTER *for* RURAL AFFAIRS

The Center has services targeted specifically at the farming sector including:

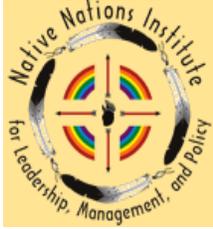
- **Beginning Farmer and Ranchers** – face several challenges and can be supported with programming that:
 - Land Matching Program
 - Smart Financial Planning for Beginners.
- **Farm Financial Planning** programs for farming including
 - **For all Farm Businesses** -: access to financial resources for Nebraskans in agriculture
 - **Beginning Farmer Finances** - potential funding sources and business planning and small business advice
 - **Farm Transition Finances** - Tax incentive information on Nebraska, information on the Beginning Farmer Tax Credit and the NIFA Aggie Bond. Retirement planning support for older farmers and succession planning.

The Center also works on a variety of policy topics most notably is:

- **Farm Policy** - The Center works with family farmers and supporters and works towards change that leads to positive reform to farm policy. The goal is to create farm policy that keeps families on the land, protects soil and water for future generations and creates opportunity for a new generation of farmers.
- **Rural Health** – work to promote policy that makes health insurance affordable for small businesses, entrepreneurs and family farmers and ranchers and to ensure policy supports small town doctors, clinics and hospitals.
- **Small Business Policy** - work for federal rural policy that recognizes the importance of entrepreneurship as a rural development strategy and provide the resources necessary for rural communities to leverage the spirit, creativity and opportunities entrepreneurship creates. (Center for Rural Affairs 2013)

[Annual Budget and Funding Sources](#)

The total revenue for 2012 was \$3.17 million US with approximately \$1.49 million US coming from private grants (Foundations, businesses and individuals) and \$1.17 million US from government grants. The remaining revenue was derived from sponsorships, microloan interest and gifts. (Center for Rural Affairs nd.)



A-5 Overview of Native Nation Institute

A.5.1 Focus

Vision

The Native Nations Institute for Leadership, Management, and Policy (NNI) is the leading research, service, and outreach organization supporting the nation-rebuilding efforts of Indigenous peoples in the United States, Canada, and throughout the world.

Mission

NNI's mission is to assist in building capable Native nations that can effectively pursue and ultimately realize their own political, economic, and community development objectives. NNI calls this effort nation building, and it is the central focus of NNI's programs. (Native Nations Institute 2013)

A.5.2 Background, Accountability and Service Area

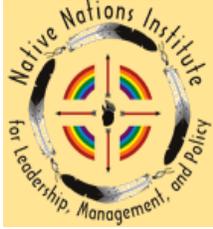
History

The Native Nations Institute for Leadership, Management, and Policy (NNI) was founded in 2001 by The [University of Arizona](#) and the [Morris K. Udall and Stewart L. Udall Foundation](#) as a self-determination, self-governance, and development resource for Native nations. (Native Nations Institute 2013)

Governance Structure

NNI is a public service entity of the University of Arizona and is a program of the Udall Center for Studies in Public Policy.

The NNI International Advisory Council (IAC) provides counsel and oversight to advise NNI and help set the organization's strategic direction. The IAC is composed of current and past Native leaders, scholars, community leaders, administrators, and non-profit and nongovernmental organization executives. The IAC meets with NNI twice a year, with less formal consultation occurring on a continuing basis. The IAC has seventeen members, including Chief Sophie Pierre from St. Mary's First Nation in British Columbia and Grand Chief Michael Mitchell of the



Mohawk Council of Akwesasne of Ontario and Quebec provinces and USA state of New York. (Native Nations Institute 2013)

Service Area

NNI serves as a self-determination, governance, and development resource for Indigenous nations in the United States, Canada, and elsewhere. (Native Nations Institute 2013)

A.5.3 Structure, Activities and Resources

Organizational Structure

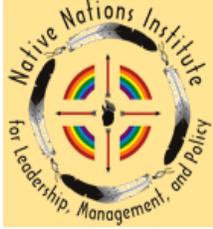
The NNI is housed at the University of Arizona's [Udall Center for Studies in Public Policy](#). NNI fulfills its mission by providing Native nations and other policy makers with accessible research and policy analysis of governance and development in native communities and with comprehensive, professional training and development programs designed to meet the needs of indigenous leadership and management. NNI is an outgrowth of the research programs of the [Harvard Project on American Indian Economic Development](#), an organization with which it retains close ties.

NNI is supported by a staff of 13 (full and part-time), including 5 staff in administrative support. The NNI also consists of 4 faculty associates, 10 policy associates, and 7 program associates. (Native Nations Institute 2013)

Key Programs and Operational Activities

As outlined in the mission statement, nation building is an important goal for NNI and specifically refers to the efforts of Native nations to increase their capacities for self-rule and for self-determined, sustainable community and economic development. A nation-building approach recognizes that Native nations today confront the classic problems of human societies, including:

- how to build effective, sovereign governments;
- how to develop vigorous economies that fit their circumstances and cultures;
- how to solve difficult social problems;
- how to achieve their own objectives in interaction with other governments;
- how to manage their environment and natural resources;
- how to balance change and cultural continuity.



To achieve this goal, NNI focuses on three strategic program areas including:

- **Policy Analysis and Research.** Peoples around the world are working to invent new development strategies and governance tools that match their unique needs and contribute to maintaining their cultures. NNI's policy analysis and research efforts are intended to further these efforts and provide indigenous groups with useful model ideas for nation building, many which can be found on NNI's website under Resources/Publications.
- **Executive Education.** NNI sponsors training sessions in Native nation building designed for tribal leaders. Topics range from constitutional reform to government design, intergovernmental relations, and economic and community development.
- **Educational Resources.** NNI's curriculum and educational resources unit develops materials for use in NNI's executive education program; offers a distance-learning suite for tribes, tribal colleges, and others known as the *Rebuilding Native Nations Distance Learning Courses*; has produced a variety of stand-alone audio and video resources; maintains the *Indigenous Governance Database*; and supports the overall educational efforts in indigenous governance across the University. (Native Nations Institute 2013)

Annual Budget and Funding Sources

Major grant support for the NNI comes from several sources including:

- Morris K. and Stewart L. Udall Foundation
- The University of Arizona
- W.K.Kellogg Foundation;
- Southern California Edison – An Edison International Company

NNI also has additional smaller grants and Fee For Service agreements with Native nations and organizations on specific projects.

Currently, the Native Nations Institute Endowment Fund is working towards raising \$10 million to support programming that benefits Indigenous nations and communities. (Native Nations Institute 2013)



A-6 Overview of Center for Rural Policy Development

A.6.1 Focus

Vision

The Center for Rural Policy and Development will be the leading and most trusted source of research and recommendations to advance policies that improve the quality of life in Greater Minnesota. (Center for Rural Policy and Development 2013)

Mission

The Center for Rural Policy and Development provides high quality and objective research to examine and advance policy and decision-making, advocacy, and civic engagement for Greater Minnesota's development. (Center for Rural Policy and Development 2013)

A.6.2 Background and Accountability

History

The Center for Rural Policy and Development was established in 1997 by the Minnesota Legislature to serve as a nonpartisan statewide resource. From its base at Minnesota State University at Mankato, it serves as a data clearinghouse for lawmakers, rural advocates, enterprise initiatives, community leaders and news organizations. (Center for Rural Policy and Development 2013)

Governance Structure

The Center is governed by a 20 member board of directors. The Center's board members come from all over the state, representing a variety of interests. Thirteen are appointed by the Governor and two are appointed by the House and Senate leadership; all members represent different aspects of rural Minnesota. Remaining members consist of five at large positions and are nominated, then voted on by the board members themselves. The board works closely with staff to help guide the direction of the Center, to set research priorities and to help make the Center a presence in the rural policy community.

The Centre works towards three core values that include:

- **Research Excellence** - endeavor to achieve excellence in every project in which they engage.



- **Political Non-Partisanship** - Political non-partisanship is the historical foundation and the Center is committed to maintaining that reputation.
- **Collaboration** - Collaboration is the key to the Center's future work with the future success of the Center being defined by the partnerships the Center creates.
- **Commitment to Minnesota** - A strong Minnesota requires a healthy and vibrant Greater Minnesota. The Center is committed to supporting quality decision-making that will positively impact Greater Minnesota's ability to thrive. (Center for Rural Policy and Development 2013)

Service Area

The Center provides rural policy analysis and advice for the state of Minnesota.

A.6.3 Structure, Activities and Resources

Organizational Structure

The Center itself has a staff complement of two. However the Center is also supported by the work of a network of academic and non-academic researchers throughout the state. (Center for Rural Policy and Development 2013)

Key Programs and Operational Activities

The Center for Rural Policy and Development produces research on rural issues in four primary areas: Technology, Economic Development, Demography and Education. A sample of research reports prepared by the Center includes:

- **The State of Rural Minnesota 2013** - The State of Rural Minnesota 2013 is a presentation produced annually by the Center for Rural Policy & Development in St. Peter, MN, showing how population, income, poverty, education, and many other indicators vary across the state.
- **Finding the Voice of Rural Minnesota** - Rural Minnesota is losing its voice. That's the conclusion of a study where researchers talked to 50 prominent Minnesota decision makers and surveyed 120+ more. Due to a combination of reasons, the state's rural population is becoming increasingly left out and left behind on the discussions that affect their everyday lives.
- **2012 Minnesota Internet Study: Digital Divide 2.0 and Beyond** - Examining the current state of Internet access in Minnesota and how the digital divide is redefined now that Internet access is here to stay.
- **Understanding Small Business Development and Entrepreneurialism in Rural Minnesota** - With the growing interest in entrepreneurialism in rural communities, the Center for Rural Policy and Development initiated a study to examine



entrepreneurialism and small business development in rural Minnesota. With economic development an ever-present concern for rural communities, the goal of this study is to gain insight into whether encouraging small businesses and entrepreneurialism can be considered a viable form of economic development for these places.

- **A Region Apart: A look at challenges and strategies for rural K-12 schools** - When this research report was first conceived, the current economic crisis was only just on the verge of revealing its full extent. But with economic crisis or no economic crisis, over the years funding for PK-12 education has been a constant struggle. And while all schools continue to face difficulties, for various reasons rural schools have different and unique sets of hurdles to overcome, largely due to factors not faced by most urban and suburban schools: declining enrollment, an aging taxpayer base, and distance, distance, distance. The intent of this research, therefore, is to present solutions, or at the very least, recommendations for changes that could be made to help maintain and improve student achievement while not increasing cost. (Center for Rural Policy and Development 2013)

Annual Budget and Funding Resources

The annual budget for the Center for Rural Policy and Development is approximately \$400,000 with State contributions totaling \$150,000 per year and grants and contributions making up the remaining \$250,000. (Gierisch. Nd.)



Appendix B – Examples of Rural Catalyst/Development Organizations

B-1 Overview of New Dawn Enterprises

B.1.1 Focus

Vision

A self-reliant people in a vibrant community.

Mission

To engage the community to create and support the development of a culture of self-reliance.

B.1.2 Background and Accountability

History

New Dawn Enterprises Limited, incorporated in 1976, is the oldest Community Development Corporation in Canada and is a Founding Member of the Canadian CED (Community Economic Development) Network.

It is a private, volunteer directed business dedicated to community building. New Dawn seeks to identify community needs and to establish and operate ventures that speak to those needs.

In 2012, the New Dawn Enterprises family of companies employed over 300 people (full time and part time) from the Cape Breton community and services 600 Cape Bretoners each day through its companies and projects.

New Dawn's businesses and work in the community are guided by its mission and vision.

Governance Structure

New Dawn Enterprises is governed by a 12 member volunteer Board of Directors. The Board is guided by and adheres to a Carver Governance Model.

Service Area

New Dawn Enterprises serves Cape Breton Island - the most eastern part of Nova Scotia. In particular, the efforts of New Dawn Enterprises tend to be concentrated in Cape Breton



Regional Municipality – the largest municipality on the island and second largest in the province of Nova Scotia. The Municipality has a population of just under 100,000. The administrative offices of New Dawn are located in Sydney, Cape Breton.

B.1.3 Structure, Activities and Resources

Organizational Structure

New Dawn Enterprises has a core administrative staff of 17. As noted below, the organization administers several different businesses, not-for-profits and social enterprises under the parent structure of New Dawn Enterprises.

Key Programs and Operational Activities

New Dawn has several major business lines. For accountability and effectiveness the business lines are managed and incorporated separately. The major program areas and operational activities of the family of New Dawn Enterprises include:

- **New Dawn Real Estate:** ownership and management of several commercial and residential real estate holdings.
- **New Dawn Health Care:** ownership and delivery of several health care services and the operation of several seniors and special needs housing facilities.
- **New Dawn College:** a registered Private Career College with the Nova Scotia Department of Labour and Advanced Education. New Dawn College offers a number of diploma programs (Continuing Care Assistant, Cosmetology Hair Design, and Basic Welding, and High Pressure Pipe Welding).
- **New Dawn CEDIFs** (Community Economic Development Investment Funds). A decade and a half ago, the Nova Scotia provincial government created the Community Economic Development Investment Funds program to generate pools of local investment capital through the sale of shares to individual community investors. Over the last number of years, New Dawn has met with much success in raising and managing Community Economic Development Investment Funds (CEDIF). This success speaks, in part, to the desire of investors for investment opportunities within their own community. In 2011, New Dawn Holdings, a separate New Dawn entity, raised almost \$2.5 million through its CEDIF – the highest one year CEDIF offering in Nova Scotia history. These funds have since provided investment capital to New Dawn Enterprises to help it grow its existing companies, launch new businesses and advance its community building



initiatives. In addition to New Dawn Holdings, New Dawn has created New Dawn Community Investments Limited and New Dawn Innovation Funds Limited to raise and manage CEDIF investments. Together these companies have raised more than \$8 million dollars through their CEDIF offerings and have returned 2-3 % dividends annually to their community shareholders.

Other New Dawn businesses and undertakings include:

- **The New Dawn Community Foundation:** The New Dawn Community Foundation was established as a registered charity in 2002. The work of the Foundation is to engage and encourage community participation and dialogue as the basis for community building. The Foundation oversees the delivery of two popular local conversation series: IDEAS: Powered by Passion and Films for Change.
- **The Holy Angels Project:** In May of 2013, New Dawn Enterprises purchased the former Holy Angels High School and Convent in downtown Sydney with aspirations of converting the 70,000 square foot facility into a centre for arts, creativity and innovation.
- **New Dawn Meals on Wheels:** A Meals on Wheels program serving Sydney and area was founded in 1972 by small groups of church volunteers. Today, this program is administered by the Volunteer Resource Centre of New Dawn Enterprises and provides more than 10,000 meals a year to seniors who are unable to cook for themselves.

Annual Budget and Funding Sources

New Dawn's annual operating budget is approximately \$7.5 million. The major sources of revenue are generated from health care services, rental income, tuition and training, investment income and charitable donations. The provincial government is a key partner with a number of New Dawn's operating divisions including New Dawn's home for persons with disabilities, and small options homes, as well as by supporting housing initiatives for low income families.



B-2 Overview of Rural Development Initiatives Inc in Oregon

B.2.1 Focus

Vision

Rural Development Initiative (RDI) is a neutral convener and facilitator. They support rural communities' ability to expand and enhance their base of skilled leaders and organizations, collaborate toward common goals, develop diverse economies, and craft and achieve long-range visions and strategic action plans. They provide tools and training for civic engagement, decision-making and conflict resolution. RDI brings expertise and perspective, helping communities engage all community members in creating a positive future. (RDI 2013)

Mission

Rural Development Initiatives builds leadership networks and rural communities. (RDI 2013)

B.2.2 Background, Accountability and Service Area

History

With the drastic downturn in the timber industry in the 80s, many rural communities in the Pacific Northwest lost hundreds of high wage jobs. The spotted owl was listed as an endangered species, drastically reducing the harvest on public lands causing many rural mills to close. Rural Development Initiatives Inc in Oregon (RDI) started in 1989 as the Community Initiatives Program which was part of the Oregon Economic Development Department. The Community Initiatives program was established to help these communities diversify their economies.

RDI began by facilitating a Strengths Weaknesses Opportunities and Threats (SWOT) Analysis in many communities, formed a diverse group of citizens representing each, and facilitated visions and strategic action plans. These plans detailed the steps to build on local assets to create new job opportunities, develop community infrastructure, strengthen the workforce and lifelong learning, and implement projects to improve the community quality of life. In 1991 the state legislature passed Senate Bill 713, transforming the Community Initiatives Program into the private non-profit RDI. (RDI nd)



Governance Structure

RDI is a public non-profit corporation and is not organized for the private gain of any person. RDI's primary purpose is to provide services, strategic planning, technical assistance, and leadership programs to rural communities, especially economically distressed rural communities (RDI 2010). The affairs of RDI are managed by the Board of Directors, there are currently fifteen and they collectively represent a range of interests (Morford, 2013 pers. comm.).

Service Area

Primarily focused on the State of Oregon but works throughout the Pacific Northwest and including northern California and the State of Hawai'i. (RDI nd)

B.2.3 Structure, Activities and Resources

Organizational Structure

As mentioned, oversight is provided by a Board of Directors with RDI's Board being made up of fifteen individuals who are an experienced group of rural leaders and influencers who believe in the importance of vital rural communities. RDI is supported by a staff of 27 with a variety of experience and expertise. The head office is based in Eugene, Oregon. (RDI 2013)

Key Programs and Operational Activities

RDI builds leadership networks and communities by working in the areas of Community Building, Leadership Development, Economic Vitality, Networking, and Organizational Development with specialized programming for Latino, Tribal, and Youth audiences. Specifically these services involve:

- **Community Building** -Community building services includes visioning, strategic planning, facilitation, and consensus building with specific focus on:
 - **Visioning** which provides unique opportunity for members of a community to come together and create a common vision of their future.
 - **Community Strategic Planning** in which RDI designs and facilitates strategic plans for communities side by side with community members.
 - **Community Collaborations** which provide training that helps rural community leaders and organizations to leverage the ability to work together.
 - **Outreach and Engagement** assists statewide, regional and local community outreach and engagement processes for projects that seek genuine and extensive input from rural perspectives. Specializes in convening diverse groups, gathering input from a wide range of people and in training community groups in rural areas of the Pacific Northwest for state-wide action.



- Community-Wide Facilitation with RDI's facilitators creates a neutral space to help community groups share perspectives, find common ground, and plan for action around important issues and decisions. Helps communities navigate their way through difficult conversations, build consensus, and use meeting time to effectively engage attendees.
- **Scenario Planning** – The Future's Game with RDI bringing The Futures Game to communities as a way to explore community planning and decision making.
- **Leadership Development** – Offers leadership services tailored to fit the needs and culture of specific groups. RDI has delivered their flagship Ford Institute Leadership Program in more than 300 communities.
- **Economic Vitality** – Focuses on helping small businesses thrive through networking, skill building, and planning. In addition to supporting entrepreneurship, they help communities develop economic development and rural tourism plans that reflect the needs and values of their community.
- **Networking** – Facilitates networking formally through events, online through RDI's RIPPLE website, and informally in an effort to connect communities that may lie far apart.
- **Organizational Development** – RDI provides services to organizations through their programs and technical assistance to help organizations plan and communicate their leadership. Services include: focusing and developing effective organizations; undertaking Board Assessment, assisting with Board Development, providing Board Training, and offering Retreats; conducting Strategic Planning for Organizations; and Specialized Technical Assistance.
- **Youth Services** – Provide youth programs across RDI's service areas including Leadership Development, Community Building, Organizational Development, Economic Vitality, and Networking.
- **Latino Services** – Trainings are adjusted to meet the necessities of the Latino culture as well as the culture of the group RDI is working with.
- **Tribal Services** – Provide technical assistance and consulting services to Tribes and other Native organizations. (RDI 2013)

Annual Budget and Funding Sources

The total revenue for RDI in 2012 was \$2.56 million, down from \$2.81 million in 2011. In 2012 the main sources of revenue included contracts and fee income (\$2.32 million) and foundation grants (\$0.15 million). A variety of other sources made up the remainder including Government grants which contributed \$26,719 in 2012. (Jones and Roth. 2013)



B-3 Overview of Kentucky Highlands Investment Corporation

B.3.1 Focus

Vision

At Kentucky Highlands Investment Corporation (KHIC) they had a dream of stimulating economic growth and creating employment opportunities so the area's citizens didn't have to leave their home to find their opportunity. That dream became their vision. (KHIC 2013)

Mission

The mission is to provide and retain Employment Opportunities in Southeastern Kentucky through sound investments and management assistance. (KHIC 2013)

B.3.2 Background and Accountability

History

KHIC was formed in 1968 to stimulate growth and create employment opportunities in a nine-county region of Southeastern Kentucky. In 2003, KHIC expanded the service area to twenty-two counties in Kentucky and has grown to become one of the largest development venture capital investors in rural America. (KHIC 2013)

Governance Structure

KHIC is governed by a fifteen member Board of Directors. In addition, KHIC has several subsidiary companies and collaborative partnerships to administer the variety of loan and venture capital funds (McDaniel. 2013. pers comm.).



Service Area

In 2003, KHIC service area included twenty-two counties in the southeastern region of Kentucky State, these counties are outlined in Figure 1.

Figure 1: Kentucky Highlands Investment Corporation Service Area



Source: KHIC (2013)

B.3.3 Structure, Activities and Resources

Organizational Structure

With a staff of 22 located in London, KY provides a range of programs and services. KHIC entered the world of venture capital in 1972. In return for offering hard-to-locate start up capital and fair financing terms, KHIC would take ownership positions. The process became known as "development venture capital." Development venture capital investing involves more active participation with management of the businesses than does traditional venture capital investing.

KHIC has moved cautiously to preserve and expand its asset base which includes debt and equity investments, real estate and fixed income investments. KHIC has developed for-profit development subsidiaries to insure its access to capital in the future. The company has subsidiaries which include a Small Business Investment Corporation, an industrial real estate development corporation and a management consulting company. (KHIC 2013)

Key Programs and Operational Activities

Investment Programs

KHIC makes equity investments and assists businesses in developing financing packages as small as \$500 US to investments up to \$10 million US. Overall, KHIC offers promising entrepreneurs and existing businesses the chance to access investment of equity dollars and



technical assistance through an investment agreement. Upon execution of the investment agreement, KHIC becomes an active partner.

Equity Investment – KHIC has a philosophy of providing comprehensive financial and technical assistance and a \$55 million US development venture capital fund, with support from KHIC staff:

- with management and financial experience;
- Expert technical assistance to ensure that the business plan is sound; and,
- The ability to tap into necessary resources through partnerships.

KHIC also participates in three other key funds including:

- KHIC has recently teamed with **Technology 20/20**, located in Oak Ridge Tennessee to form two equity funds.
- The **Southern Appalachian Fund (SAF)** is a \$12.5 million US venture capital fund formed to provide equity capital and operational assistance to qualifying businesses in Southern Appalachia. The Fund's investors include a number of institutional investors (\$5 million US) and the United States Small Business Administration (\$7.5 million US).
- **Meritus Venture, L.P.** (Meritus) is a \$36 million US venture capital fund formed to make equity investments primarily in private, expansion-stage companies in predominantly rural areas in central and southern Appalachia. In addition, Meritus can provide operational assistance to portfolio companies and prospective portfolio companies. (KHIC. 2013)

Loans Programs - Kentucky Highlands has many loan programs including:

- Loans Up to \$50,000 US – Micro Enterprise Loan Fund designed to encourage the development of small businesses by extending credit and technical assistance.
- Loans Up to \$250,000 US – Small Business Loan Fund used to purchase and/or develop real estate, buy new or used equipment, and for working capital for the business.
- Current Asset Leverage Financing – offers working capital lines of credit to businesses.
- Business and Industry Loans - designated as a guaranteed lender in the United States Department of Agriculture Business and Industry Loan Guaranty Program.
- Community Advantage Loans – KHIC has been designated as a Small Business Administration Community Advantage Guaranteed Lender.
- Goldman Sachs 10KSB Program Participant – KHIC is a member of the Goldman Sachs 10,000 Small Business Collaborative offering loans to be used for equipment and working capital.

Management Assistance – Kentucky Highlands provides both short term and long term technical assistance to make the business viable. This type of assistance can range from financial to management assistance.



Industrial Development – KHIC has invested in prepared sites that facilitate rapid construction. KHIC has developed a number of tracts that are referred to as Land, Excavation, Architectural and Piers (LEAP) sites. The site is completely prepared to immediately begin the erection of up to a sixty thousand square foot building with desired eave heights.

Empowerment Zones – Designed to induce business investment in three of KHIC's most distressed counties, the \$13 million (US) KHEZ Developmental Venture Capital Fund makes fixed asset and working capital financing available to businesses. (KHIC 2013)

Energy Boot Camp Program

The KHIC Energy Boot Camp was an intensive performance-based entrepreneurial training and mentoring program conducted with Technology 2020's Center for Entrepreneurial Growth (CEG). Its purpose was to help energy-related researchers, inventors, and entrepreneurs prepare a path to business sustainability and profitability. (KHIC. 2013)

Annual Budget and Funding Sources

Revenues for the organization totalled \$17.5 million US in 2013 and included \$3.9 million US from: interest earned from loans/rental income and earnings and returns from equity investments; \$8.9 million US from principal repayments; \$0.7 million US from management fees from portfolio and fund management; and, \$4.0 million US from grants from foundations and governments. (McDaniel. 2013. pers. comm.)

B-4 Overview of Maine Coastal Enterprise Inc.

B.4.1 Focus

Vision

Maine Coastal Enterprise Inc (CEI) is a Maine-based organization with strategic expansions outside of Maine, serving more rural communities directly or through alliances and having an ever greater impact on poverty, which is documented with data. The organization has a high financial sustainability ratio, thanks to new and expanded sources of funds through private giving, public funds, and income from funds and venture capital. CEI has a metric for looking at the balance of the 3 Es—economy, equity and environment—through all initiatives, and has a group in place measuring impact, scanning for opportunities, and developing policy. The board is broader, reflects CEI's initiatives and geography, and is being used effectively. CEI is innovative and entrepreneurial, leveraging its competencies for maximum impact on the targeted population: people and communities in poverty, left out of the economic mainstream, the underserved and at-risk populations. CEI has a clear brand identity and has activated businesses and communities for policy development and fund-raising. (CEI 2013)

Mission

To help create economically and environmentally healthy communities in which all people, especially those with low incomes, can reach their full potential. (CEI 2013)

B.4.2 Background, Accountability and Service Area

History

CEI was founded in 1977 to develop job-creating natural resources and small business ventures in rural regions of Maine, and has grown to serve business, farming, and forestry in rural areas of Maine, its primary market, and areas of northern New England and upstate New York. With its New Markets Tax Credit Program, CEI is able to invest in projects throughout rural America. (CEI 2013)

CEI's first economic development projects were in the natural resources industries of fisheries, farming, and forestry. In the late 1970s CEI launched the Aquaculture Development Workshop to foster new ways of "farming the sea" and complement the revenues among, and bring relief to, traditional fishermen already experiencing sustainability challenges. CEI's first major investment was in 1979 in its flagship "working waterfront" venture, Boothbay Region Fish and Cold Storage. (CEI nd)

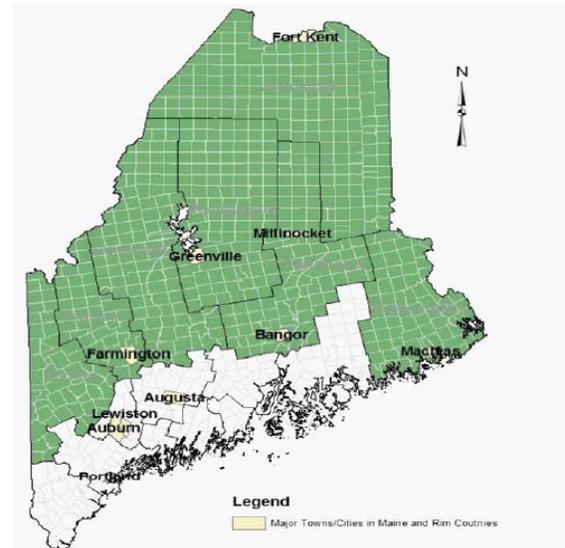
Governance Structure

CEI is a private, non-profit Community Development Corporation (CDC) and Community Development Financial Institution (CDFI) based in Wiscasset, Maine. CEI is governed by a 17-member board of directors with directors represented by the public and private sectors (CEI 2013). The board helps establish policy and priorities for program development, oversees the fiduciary functions and major investment decisions of the organization, and serves as a resource for overall corporate development (The Real Estate Board 2008a).

Service Area

CEI serves all of Maine as its main market area, with greater priority being given to Maine’s remote rural “rim” counties (See

Figure 2: Location of Rim Counties in the State of Maine



Source: The Real Estate Foundation (2008)

Figure 2). In addition, CEI also services areas of northern New England and upstate New York. Furthermore, specific programs operate beyond this area. (See Organizational Structure below) (CEI.nd.a)

B.4.3 Structure, Activities and Resources

Organizational Structure

CEI has 80 staff and operates a number of small business financing and technical assistance programs. It also oversees three major subsidiaries that enable it to expand its programs and services:

- **CEI Ventures, Inc.** and **CEI Community Ventures, Inc.** have invested \$35 million US in venture capital in promising job generating ventures throughout Maine, New England and beyond; and,
- **CEI Capital Management, LLC** manages CEI's \$461 million US allocation under the New Markets Tax Credit program with a core market covering Maine, New Hampshire, Vermont, Western Massachusetts, and upstate New York.

CEI's goal is to continue to grow the organization's assets by 10 percent each year to finance community-based small businesses, natural resource projects, affordable housing, and community facilities/commercial real estate projects, using Triple Bottom Line or 3E criteria. Triple Bottom Line investing pursues the 3Es of a return on investment that accounts for *economy, equity, and environment*. (CEI.nd.a)

Key Programs and Operational Activities

CEI's operational activities occur in six major fields of work. Overall, CEI offers business financing and technical support for a wide range of small business, community facility, affordable housing and mixed used real estate projects and ventures. These six include:

- 1) **CEI business financing opportunities** include:
 - **Direct loans** to start-up, existing and growing Maine small businesses, in amounts ranging from \$1,000 US to \$50,000 US.
 - **Venture capital** investments in small businesses located in New England and the mid-Atlantic region. Investments range from under \$500,000 US to over \$1 million US.
 - **New Markets Tax Credits** targeted at distressed communities in Maine, Northern New England, and upstate New York with projects with high 3E impact considered in other parts of the country. Tax credit investments range from \$2 million US to \$30 million US.
 - The **SBA 504 loan program** provides fixed-rate financing for machinery, equipment and buildings - as much as \$4 million US for manufacturing.
 - **Affordable Homeownership**, rental and supported housing loans and development capital from under \$500,000 US to over \$2 million US.
- 2) **Multifamily Housing Finance and Loans** - offers a variety of housing loans and finance solutions for buyers and developers of housing properties serving low and moderate income people including; Short-Term 1st Position Loans, Subordinated Debt, Bridge Loans for Property Acquisition, Predevelopment Loans, and Construction Loans.
- 3) **Business Advise and Training** - Through one-on-one consultation, training, workshops, seminars, peer networks and other services, CEI helps individuals across the state get the information they need to start or expand their small businesses. Specific support includes:
 - **One-on-One Business Consulting** - General business counseling and targeted programs for women, refugees or immigrant, fishermen/women or those in waterfront businesses, and farmers or those involved in sustainable agriculture.

- **Training Programs** - The Maine SBDC at CEI and the Maine Women's Business Center offer training seminars and conferences on business-related topics.
- 4) **Housing Program** with comprehensive housing services including: housing development services, multifamily housing finance opportunities, housing counseling, and homeowner education.
 - 5) **Natural Resource Development** - CEI has been working with the farming, fishing, and forestry industries since its founding in 1977. Today, while the types of businesses have changed somewhat, CEI still working closely with these three industries through targeted programs. However, CEI's is now added sustainable resources, with CEI focusing attention on renewable energy development in Maine.
 - 6) **Workforce Development** - Dedicated to the employment issues of people with low incomes and those at risk of poverty, CEI has developed a model to increase economic self-sufficiency. This model involves four strategies:
 - **Implement Employment Training Agreements (ETAG)**. This “social compact” between financed businesses and CEI targets a percentage of newly created jobs for low-income individuals.
 - Act as a **workforce intermediary** to connect businesses looking for qualified workers to low-income job seekers.
 - Provide **human resources support** to the businesses in CEI's lending portfolio. Link businesses with resources to upgrade the skills of their workforce and provide training for new workers, as well as broker services for businesses.
 - Develop **innovative projects** that yield best practices and training models proven to help job seekers find and keep jobs.

In addition, CEI is involved with the **Lincoln County Regional Planning Commission (LCRPC)**– This office works as a single point of contact and a clearinghouse – LCRPC provides information and direction to state and federal agencies and private sector resources, and assists towns, businesses, and community organizations in growth.

Advocacy at CEI – CEI has devoted increasing amounts of time and resources to appropriations policies that would retain, restore, and expand resources for the community development industry. CEI joined with peers to advocate for federal programs important to community development. On the state level, CEI regularly advocates for resources such as the popular Regional Economic Development Revolving Loan Fund managed by the Finance Authority of Maine, and for funding for child care facility and microenterprise development. It also advocates for policies and programs that support affordable housing for all people in Maine. (CEI 2013)

Annual Budget and Funding Sources

CEI and subsidiaries had revenue of \$26.44 million US in 2012, this was up from \$15.21 million US in 2011. Revenues came from a variety of sources with the largest sources in 2012 including \$8.40 million US in fee income, \$7.78 million US in federal and state sources, \$4.87 million US from net change in unrealized appreciation on investments, \$1.50 million US from interest and dividend income, \$1.33 million US from private/public sources, and \$1.29 million US from rental income. (CEI nd.b)

B-4 Overview of Rural Action in Ohio

B.4.1 Focus

Vision

Together, we envision a region of clean streams, healthy forests, thriving family farms, meaningful jobs for everyone, lively towns that remember local history and celebrate their stories, music, arts, and crafts, and people working together to make this vision a reality (Rural Action in Ohio 2013).

Mission

Rural Action's mission is to foster social, economic, and environmental justice in Appalachian Ohio (Rural Action in Ohio 2013).

B.4.2 Background, Accountability and Service Area

History

Rural Action was formed in 1991 out of a citizen action organization, the Appalachian Ohio Public Interest Campaign (AOPIC). AOPIC members organized and trained grassroots groups to advocate on issues of economic and environmental justice. This work included testifying before Congress regarding laws concerned with protecting water resources from the effects of longwall mining and protecting those whose land was being affected by surface mining.

In 1992, the group redefined itself as a member-based development organization renamed Rural Action. A strategic planning process resulted in the creation of a guiding document to promote a sustainable, just, and inclusive development path for Appalachian Ohio. From 1994 until 2009, Rural Action has hosted one of the largest rural development AmeriCorps VISTA (Volunteer In Service To America) programs in the country. (Rural Action in Ohio 2013)

Governance Structure

Rural Action has a board of 15 members which provide guidance for the organization and is structured into three sub-committees including: finance, donor development, and impact (Decker. 2013. pers comm). Overall, Rural Action continues to be focused around its original Strategy that is based on the organization's three pillars of sustainable development – economy, equity, and the environment. The goal is to transform the region's dialogue from traditional industrial recruitment to sustainable development led from community capacity. (Rural Action in Ohio 2013)

Service Area

The service area for Rural Action in Ohio is chartered for work in 32 counties that form the Appalachian region in the state of Ohio (Rural Action in Ohio 2013). However, within Ohio, programming activity is concentrated around Athens and surrounding counties of Hocking, Meigs, Washington, Vinton, Morgan, Perry. Rural Action in Ohio is also active in Tuscarawas and Carroll Counties in the north of Ohio (Decker. 2013. pers. comm.).

B.4.3 Structure, Activities and Resources

Organizational Structure

Rural Action has sixteen staff located within seven departments including: administration/development and communications, finance, sustainable agriculture, sustainable forestry, watershed restoration, environmental education, and Appalachian Ohio Zero Waste Initiative (Rural Action in Ohio 2013). In addition, there is sixteen service members associated with the Rural Action AmeriCorps initiative and programs (Decker. 2013. pers comm.)

The organization is focused on approaches and activities that aim to improve the welfare and livelihoods of people living in rural Ohio. These approaches pay attention to the seven forms of community wealth: financial, natural, social, individual, built, intellectual, and political capital. (Rural Action in Ohio 2013)

Key Programs and Operational Activities

- **AmeriCorps – Ohio Stream Restore Corps** - Rural Action watershed groups partnered with three other existing watershed groups to form a regional program under the administration of ServeOhio, and the Ohio Commission on Service and Volunteerism.
- **Sustainable Agriculture** – offers educational events, non-profit project, management services, and collaborative planning to partners who support the vision of a region of thriving family farms with specific programming including: Chesterhill Produce Auction, Ohiofoodshed, Trimble Township farmers market, and Rural Action Sustainable Agriculture services and workshops.
- **Sustainable Forestry** – works with private landowners, government agencies, and non-profit organizations to develop innovative strategies that promote the sustainable production, management, and marketing of forest resources with specific programming including: Appalachian Carbon Partnership, forest botanicals, planting stock program, woodlot owners toolkit, and WoodRight, a sustainably certified hardwood building materials sales and marketing platform.
- **Watershed Restoration** - Staff and AmeriCorps have implemented watershed action plans, installed remediation technologies and regularly perform water quality sampling testing across four acid mine drainage affected watersheds, bringing back dozens of fish species.

- **Environmental Education** – The Environmental Education team helps young people develop a sense of place and gives them tools to make informed decisions about their natural resources. The program works with teachers through the Appalachian Green Teachers Program, helping them use outdoor spaces to teach Ohio content standards; community based education; youth environmental congress; and professional development with partners like the Ohio Historical Society.
- **Appalachia Ohio Zero Waste Initiative (AOZWI)** - collaborates with communities to build local wealth and environmental health by increasing waste diversion and supporting the development of a zero waste economy. The AOZWI is coordinated by Rural Action in partnership with the Voinovich School of Leadership and Public Affairs at Ohio University.
- **Energy Committee** – has been gathering information and developing focus area in energy efficiency called Village ESCO.
- **Look Before You Lease (LB4UL)** – Rural Action is cautious about the development of shale gas in the region and does not want it to happen at the expense of smart and protective policies for the citizens of Ohio. In addition, Rural Action does not want development to happen at the expense of local water resource. Overall, the goal is to assist the landowners by providing enough education, resource, and guidance to make them feel comfortable with their decision. (Rural Action in Ohio 2013)

Annual Budget and Funding Sources

The 2012 budget for Rural Action was \$1.66 million US with grant and contract revenue making up 77% of revenues, 11% from produce action sales, 5% from donations and member dues, 4% from earned income, and 3% from capital contributions (Rural Action nd.).

B-5 Overview of Scotland's Highlands and Islands Enterprise

B.5.1 Focus

Vision

Highlands and Islands Enterprise (HIE) works to make Scotland's Highlands and Islands a highly successful and competitive region where increasing numbers of people choose to live, work, study and invest (HIE 2013).

Mission

To generate sustainable economic growth in every part of the Highlands and Islands. (HIE 2013).

B.5.2 Background, Accountability and Service Area

History

The Highlands and Islands Development Board was established in 1965 to begin to address the various economic challenges in the Scottish Highlands and Islands region (HIE 2008). Ministerial reforms in September 2007 followed by the Government Economic Strategy (GES) released in November 2007 signalled a change in the role and focus for HIE and aligned its own strategic priorities to support the GES (HIE 2011).

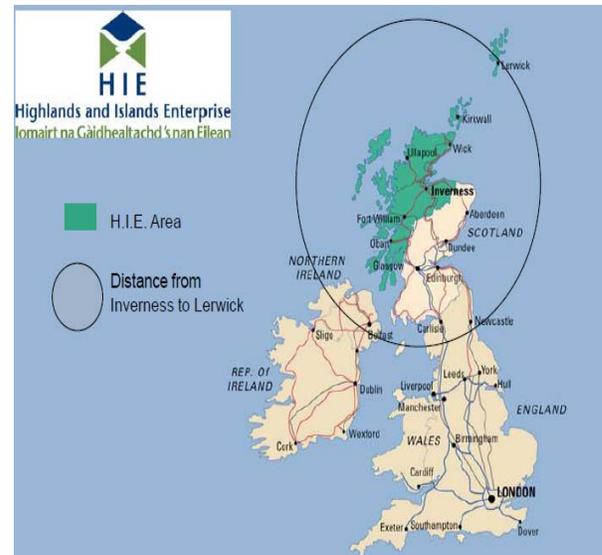
Governance Structure

The HIE Board has overall responsibility for ensuring that HIE fulfils its statutory duties and the aims and objectives set out by the Scottish Government. The Board has specific responsibility for approving HIE's three year operating plan, and ensuring that the Scottish Government has thorough arrangements for appraising, monitoring and evaluating these targets. In addition, the HIE Board has two committees, the Remuneration Committee and the Risk and Assurance Committee (formerly the Audit Committee). (HIE 2013)

Service Area

As outlined in Figure 3, HIE works in a diverse region which extends from Shetland to Argyll, and from the Outer Hebrides to Moray, covering more than half of Scotland's landmass (HIE 2013).

Figure 3: Highlands and Islands Region



Source: HIE (2008)

B.5.3 Structure, Activities and Resources

Organizational Structure

With a total staff of 256, HIE has offices throughout the Highlands and Islands, including area offices, serving local businesses and communities from the Outer Hebrides to Moray and from Shetland to Argyll. HIE is focused on four priorities:

- Supporting businesses and social enterprises to shape and realise their growth aspirations;
- Strengthening communities and fragile areas;
- Developing growth sectors, particularly distinctive regional opportunities; and,
- Creating the conditions for a competitive and low-carbon region. (HIE 2013)

Overall, HIE focuses on capitalizing on opportunities where the Highlands and Islands has a comparative advantage. It also plays a crucial role in helping to deliver the Scottish GES with its own plan wholly aligned with this plan. (HIE nd)

Key Programs and Operational Activities

HIE has a variety of programs and undertakes several operational activities to realize its four key priorities. For the key priority of supporting business and social enterprises to shape and realize their growth aspirations, HIE support includes:

- **Account management** – provide direct financial support (including grants, loans, and equity), property solutions and a range of advice and information services.
- **International Trade and Investment** – Through partnership with Scottish Development International and specific programs with others HIE helps access international markets.
- **Innovation, entrepreneurship and leadership** – HIE provides a leadership development program in partnership with Massachusetts Institute of Technology. There is also a Business Mentoring Program and HIE is working with the Scottish Funding Council to support innovation funding for developing new products and processes.

For the second priority area, to support the strengthening of communities and fragile areas, HIE undertakes:

- **Community-led development** – supporting community empowerment to maximize benefits from local assets and build transformational change.
- **Enabling social enterprises** – supporting the acquisition and development of income-generating assets such as land, buildings and renewable energy generation and to provide vital services.
- **Fragile areas** – support specific projects that assist businesses and social enterprises to generate growth and contribute to community resilience.
- **Arts and culture** – using a variety of tools to support art and culture including developing the HIE Gaelic Plan.

For the third priority area, which is developing growth sectors, particularly distinctive regional opportunities, HIE pursues:

- **Collaborative approach with partners** – Working with key partners to support GES seven key sectors which include energy, life sciences, food and drink, creative industries, sustainable tourism, financial and business services, and universities. In addition, HIE is working to maximize European funding in the region.

Finally, in the key priority area of creating the conditions for a competitive and low carbon region, HIE is working on:

- **Creating a digital region** – working on delivery of superfast broadband infrastructure across the entire region through co-investment and working in partnership with a commercial company and public partners.
- **Developing low carbon opportunities** – working with Transport Scotland and Scottish Enterprises on strategies for enabling development of low carbon transport, including vehicle technologies for road transport in rural and island areas. (HIE nd)

Annual Budget and Funding Sources

The budget for HIE over the next three year-period from 2012/13 to 2014/15 is estimated at £75.6 million annually (approximately \$122.5 million Canadian) (HIE nd). HIE is mainly financed by Scottish Ministers through the Scottish Government Business, Enterprise and Energy



Directorate (approximately £48.4 million). In addition, it has receipts in the form of rents, interest, loan repayments, European Union funding and proceeds received from the sale of assets (HIE. 2011).



Appendix C – BC Based Rural and Regional Economic Development Organizations

C-1 Regional Trusts

C.1.1 Columbia Basin Trust

History

The Columbia Basin Trust (CBT) was established under the Columbia Basin Trust Act of 1995. Its purpose was to benefit the region adversely affected by the Columbia River Treaty (CRT) of 1964 which led to the construction of the Duncan, Keenleyside and Mica dams. In 1992, local governments and First Nations established the Columbia River Treaty Committee to negotiate with the Province for a benefits agreement. Key objectives included the creation of a trust governed by local residents and a fair share of the ongoing downstream benefits earned under the CRT.

Reflecting the desires of the people of the Columbia Basin, the committee approached the Province of BC in order to negotiate:

- That funds be allocated to the region, representing a fair share of the ongoing benefits being realized outside of the Basin as a result of the CRT; and,
- That a regional organization, governed by a board of Basin residents, be created to manage those funds.

Negotiations were successful on both counts, and, in 1995, Columbia Basin Trust was established. A binding agreement was also established which resulted in the following for the residents of the Basin through Columbia Basin Trust:

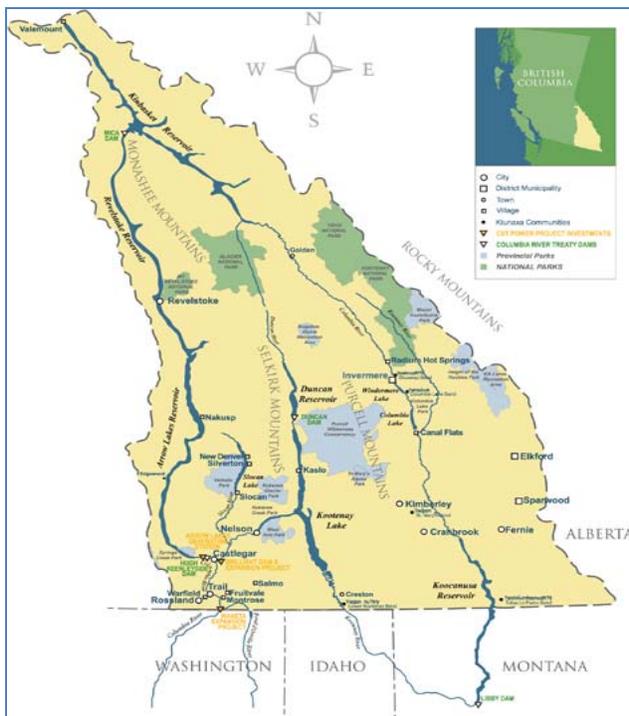
- \$276 million to finance power project construction;
- \$45 million, which CBT used as an endowment; and,
- \$2 million per year from 1995 to 2010 for operations.

Today CBT continues to engage with residents and communities in an ongoing dialogue to address Basin priorities.(CBT 2013)

Service Area

As illustrated in Figure 4, the Columbia Basin Trust Service Area is positioned in the southeast corner of British Columbia and is bound by Alberta in the east and by the states of Washington, Idaho and Montana to the south. CBT extends north to Valmout and extends west to the height of land along the Arrows Lakes Reservoir.

Figure 4: Columbia Basin Trust Service Area



Source: Columbia Basin Trust (2013)

Mandate

The Mandate of CBT is to manage its assets for the ongoing economic, environmental and social benefit of the Columbia Basin region (CBT. 2009). CBT has two core functions including:

- Invest capital and manage the assets of CBT (accomplished through CBT's Investment Program); • and
- Spend the income earned from CBT's investments to deliver benefits to the Columbia Basin • (these activities are described as Delivery of Benefits).

The mandate is driven by CBT's vision which is outlined in Figure 5.



Figure 5: CBT Vision Statement

Columbia Basin Trust will work towards a long-term vision for the future of the Columbia Basin, where:

- Columbia Basin is a place where social, environmental and economic well-being is fostered.
- Collaborative relationships and partnerships are established across the Basin. Communities work together in a spirit of mutual support and respect for each other's differences. Residents identify with a Basin culture and feel a sense of belonging to a Basin community. Residents are involved in community decision-making.
- A healthy environment is the basis for social and economic activities. Residents are committed to long-term and enduring stewardship of the Basin's natural resources.
- The economy of the Basin is diverse, resilient and energized. Communities are responsive to both the needs of the present and the future. Community enhancement initiatives are widely supported and residents share responsibility for their implementation. Practical and innovative investments in the Basin serve to increase the range of options for present and future generations.

Columbia Basin Trust will also be guided by a long-term vision of itself as a regional corporation, having:

- A successful portfolio of investments in the Basin which help to stimulate the regional economy and which provide a reliable stream of income for use in Columbia Basin Trust's Delivery of Benefits activities.
- A proven track record in delivering social, economic and environmental benefits to the Basin and its residents.
- Well-established and productive working relationships with others in the Basin whose activities relate to Columbia Basin Trust's mandate.
- Consistent and widespread public support for Columbia Basin Trust's activities based on meaningful public input and Columbia Basin Trust's responsiveness to the needs of the Basin and its people.

Source: Columbia Basin Trust (2010)

Governance

A board of twelve directors governs CBT. The five regional districts of the Columbia Basin and Ktunaxa Nation Council each nominate a minimum of one and a maximum of four directors, and the Province of BC nominates the remaining six directors. The Lieutenant Governor in Council makes all of the final appointments to the Board. All directors must reside in the Columbia Basin. (CBT 2013)

In governing CBT, the Board of Directors is committed to upholding the core values of CBT established in the Columbia Basin Management Plan with the values including respect, accountability, transparency, engagement, empowerment, and stewardship. (CBT. 2012)



One way CBT remains accountable to Basin residents is through the use of its advisory committees, which provide advice on how CBT delivers benefits to the region. CBT has three advisory committees in its core areas of social, economic and environment, plus two program advisory groups that provide advice on youth and water initiatives. (CBT 2013)

Structure

The work of the board is supported by a staff of 57 with staff located in four offices throughout the Basin including Castlegar, Cranbrook, Golden, and Nakusp with community liaisons work out of each office. These community liaisons are responsible for developing relationships in their home base community and the surrounding area. They help communities access funds, and serve as resources when communities are working through issues and taking action. (CBT 2013)

Overall, CBT's programs and initiatives aim to:

- Improve environmental conditions in the Basin;
- Identify social and economic priority issues and implement mechanisms to address them;
- Improve Basin residents understanding and involvement in water issues; and
- Ensure youth in the Basin are actively engaged in addressing social, economic and environmental issues.

In addition, CBT partners with existing groups across the Basin to deliver a range of programs that will benefit Basin residents. By partnering with and supporting local organizations, CBT feels it is able to achieve greater results. (CBT. 2013)

Key Operational Activities

CBT has 19 programs covering climate change, environmental, economic, social, broadband, youth and water objectives. The Programs include:

- 1) **Affordable Rental Housing Initiative** (ARHI) provides funding for the creation of new affordable rental housing projects in communities across the Basin.
- 2) **Columbia Kootenay Cultural Alliance** (CKCA) delivers the arts, culture and heritage funding program on behalf of CBT.
- 3) **Basin Business Advisors Program** (BBA) was created to build economic capacity in Basin communities by strengthening and supporting existing business.
- 4) **College Community Service Awards** (CCSA) are designed to assist Basin residents in pursuing their second or third year of post-secondary education/training at any college or university.
- 5) **Columbia Basin Bursary Program** (CBBP) promotes access to education and training for Columbia Basin students who are attending college in the Basin.



- 6) **Community Development Program** sees CBT works closely with people who live in the Columbia Basin to develop and deliver programs and initiatives that respond to their needs and support communities.
- 7) **Community Directed Youth Funds (CDYF)** increases local activities, opportunities and/or services for youth ages 12 to 19.
- 8) **Community Initiatives and Affected Areas Programs**, CBT's oldest programs, support projects identified as priorities within individual communities.
- 9) **Endowment Support for Community Foundations and Community Funds** supports new community foundations and community funds in the Basin through an endowment-matching program.
- 10) **Environmental Initiatives Program (EIP)** provides support to community-initiated-and-supported projects that aim to reduce the impacts humans have on local and regional ecosystems.
- 11) **Grassland and Rangeland Enhancement Fund (GREF)** is delivered by the Kootenay Livestock Association. The Grassland and Rangeland Enhancement Fund supports efforts to maintain and/or enhance grassland resources while meeting conservation, environmental and recreational activities.
- 12) **School Works Program** provides a wage subsidy to encourage businesses and organizations in the Basin to provide part-time employment for full-time high school and post-secondary students during the school year.
- 13) **Social Grants Program (SGP)** funds projects in the Basin that support social well-being and address social issues in communities.
- 14) **Sponsorship Program** can accommodate sponsorship requests to support community events or activities.
- 15) **Summer Works Program** provides an hourly wage subsidy to support the success of small businesses in the Basin, as well as creates up to 150 summer jobs for students in the region.
- 16) **Training Fee Support Program** is a bursary-style program that promotes access to education or training that helps Basin residents adapt to meet employment needs.
- 17) **Youth Action Grants** supports projects from Basin youth aged 12 to 19, with up to \$3,000 for projects that demonstrate youth-led action with positive outcomes.
- 18) **Youth Community Service Awards** provides up to 45 awards valued at \$2,000 each, based on volunteer service and is adjudicated by committees at the school level.
- 19) **Youth Grants Program** funds up to \$15,000 per project that directly benefit Basin youth aged 12 to 29.



C.1.2 Northern Development Initiative Trust

History

On October 6, 2004 the Province of British Columbia introduced Bill 59, the Northern Development Initiative Trust (NDIT) Act. Later in September 21, 2005, the Province of British Columbia introduced Bill 6, the Northern Development Initiative Trust Amendment Act, 2005. Under Bill 6, the Trust received an additional capital infusion of \$50 million from the Province.

Established through these acts of legislation, and initially infused with two deposits totaling \$185 million, NDIT is a regionally operated economic development funding corporation for central and northern British Columbia. Northern Development operates independently from government and provides the funding and ability to identify and pursue new opportunities for stimulating economic growth and job creation within the region. (NDIT 2013)

Service Area

The NDIT region includes all of northern British Columbia and central interior portion of the province. It extends as far south as Lytton. There are 8 regional districts (RDs) and one region within the NDI region including:

- Peace River RD;
- Fraser Fort George RD;
- Cariboo Chilcotin RD;
- Bulkley Valley RD;
- Central Coast RD (northern portion of RD);
- Kitimat Stikine RD; and,
- Thompson Nicola RD (including western portion of RD, only including incorporated communities of Lytton, Ashcroft, Cache Creek, Clinton and Logan Lake and surrounding electoral areas).
- Squamish Lillooet RD (including Lillooet and surrounding electoral areas only); and,
- Stikine region.



Figure 6 outlines the NDIT service area within the province of British Columbia.

Figure 6: NDIT Service Area



Source: NDIT (2013)

Mandate

NDIT’s vision statement is outlined in Figure 7 below, and the mandate is supported by its mission statement that states that NDIT is to be a catalyst for northern British Columbia and to grow a strong diversified economy by stimulating sustainable economic growth through strategic and leveraged investments.

Figure 7: NDIT Vision Statement

Northern B.C. has world-class industries, diversified regional economies and growing, energetic communities.

The mandate is further supported by NDIT’s organization objectives which focus on:

- **Capacity building** – To maintain and increase the Trust’s reputation as a sustainable organization that contributes to the continuous growth and development of economic development skills, abilities and scope in all communities in the Northern Development region.
- **Funding** – To develop and maintain critical grant, loan and other programs that sustainably dispense funding to high value projects that support community and economic development throughout the Trust area.



- **Investment attraction** – To raise the profile of central and northern B.C. in regions beyond our own in an effort to attract new residents, workers and investors to the region.
- **Business development** – To facilitate the growth of manufacturers and suppliers in the region, enabling local economic growth associated with major resource developments and infrastructure projects.
- **Demonstrating best practices** – To responsibly steward the capital base of the Trust for the benefit of member communities and maintain a reputation for the highest standards of responsiveness, client service and collaboration in regional economic development. (NDIT 2013)

Governance

The Northern Development Initiative Trust is governed by a board of eight local government officials appointed by four Regional Advisory Committees, and five regional business leaders appointed by the Province of British Columbia for a total of thirteen Board members. The Board is responsible for Northern Development's strategic direction, policy decisions, and effectiveness. In addition, the Board ensures that there are effective internal systems in all areas of corporate activity and is charged with the task of defining the corporate mandate, its mission, vision and objectives, its operations, and its by-laws. (NDIT nd)

Northern Development's Board of Directors are provided advice from four Regional Advisory Committees comprised of elected local government leaders from each of the regions. This ensures that local knowledge is incorporated into Northern Development's Strategic Plan as well as all funding approval processes. The four Regional Advisory Boards include: Northeast, Northwest, Cariboo-Chiclotin and Lillooet, and Prince George.

NDIT is governed by corporate ethics that state as stewards of a public trust NDIT will:

- Dedicate ourselves to building economic capacity and sustainability throughout the Trust area.
- Responsibly steward a capital base to support Trust area communities in perpetuity.
- Develop strong partnerships throughout the region and uphold the values of the communities and businesses we work with. (NDIT 2013)

Structure

As mentioned above, NDIT is guided by its Board of Directors with input from the four Regional Advisory committees and is supported by a staff of eight. NDIT staff are based in Prince George.

In addition, the Board maintains a working relationship with the Ministry of Jobs, Tourism and Skills Training through meeting with the Minister, executive staff and regional staff. Working relationships with other federal and provincial government ministries are also maintained. NDIT



also works with the Business Council of British Columbia, Chamber of Commerce, Canadian Federation of Independent Business, Canadian Manufacturers and Exporters, Industry Associations, local governments, community groups and financial institutions on economic development and diversification initiatives. (NDIT 2013)

Key Operational Activities

NDIT has developed thirteen programs which it uses to meet its strategic objectives. These programs are divided into three program areas including Business Development, Community Infrastructure and Capacity Building. Within the Business Development program area there are three programs including:

- 1) **Competitiveness Consulting Rebate** – Program provides a rebate to small and medium sized companies engaged in manufacturing, innovative technologies, resource processing, transportation, distribution and their first line suppliers for outsourced consulting services.
- 2) **Northern Industry Expansion** – Supply Chain Financing program provides small and medium sized manufactures, resource processing companies and first-line suppliers with incremental capital in the form of loans to help expand their businesses to meet the demands of today’s marketplace.
- 3) **Northern Industry Expansion** – Working Capital provides small and medium sized manufactures, resource processing companies and first-line suppliers with incremental capital in the form of loans to help expand their businesses to meet the demands of today’s marketplaces.

In the Community Infrastructure program area, there are five programs including:

- 4) **Business Façade Improvement** – Program provides annual grant funding for municipalities and regional districts located within the Prince George region, Cariboo-Chilcotin/Lillooet region (with the exception of the Village of Cache Creek), and the Northwest Region (with the exception of the Skeena – Queen Charlotte Regional District and the District of Port Edward).
- 5) **Community Halls and Recreation Facilities** – Program provides municipalities, regional districts, First Nations bands and registered non-profit organizations with funding from a regional development account to improve or expand existing facilities in order to increase the number of events held annually in the community, contributing to service sector revenues in the local economy.
- 6) **Community Revitalization** – Program is a new incentive program that can be offered by municipalities in partnership with Northern Development that is aimed at encouraging new development and redevelopment within central and northern B.C. communities.
- 7) **Economic Diversification Infrastructure** – Program provides funding for municipalities, regional districts, First Nations bands, and registered non-profit organizations via Northern Development’s five principal Trust accounts: the regional development accounts (Cariboo-Chilcotin/Lillooet, Northeast, Northwest, and Prince George), and the Cross Regional account.



- 8) **Feasibility Studies** – Program provides up to \$20,000 in grant funding for municipalities, regional districts, First Nations bands, and registered non-profit organizations via Northern Development’s six principal Trust Accounts: the regional development accounts (Cariboo-Chilcotin/Lillooet, Northeast, Northwest, and Prince George), the Cross Regional account, and the Pine Beetle Recovery account to undertake feasibility study projects.

Finally, the Capacity Building program area there are four additional programs including:

- 9) **Community Foundation Matching** – Grants program provides all municipalities or regional district electoral areas with up to \$50,000 from a regional development account in matched funding to assist with establishment of a dedicated endowment within a registered community foundation over a two year period.
- 10) **Economic Development Capacity Building** – Funding provides up to \$35,000 annually from the Cross Regional account to municipalities and regional districts. This funding is provided each year to build economic development capacity throughout central and northern British Columbia.
- 11) **Governance Essentials** – Program for Directors of Not-For-Profit Organizations provides twelve need-based Northern Development Initiative Trust scholarships, valued at \$1,000 each. These scholarships are available annually to support the participation of not-for-profit board members and executive directors who would not be able to participate in the “Governance Essentials Program” due to financial considerations.
- 12) **Grant Writing Support program** – Provides \$405,000 in annual funding from the Cross Regional account for grant writer positions employed by municipalities, regional districts, incorporated improvement districts, and First Nations bands within the Northern Development Initiative Trust region.

Northern Development’s board had approved 1,059 projects as of December 31st, 2012 across the four development regions. (NDIT 2013)

C.1.3 Southern Interior Development Initiative Trust

History

On February 27, 2006 the government of British Columbia enacted legislation launching the Southern Interior Development Initiative Trust (SIDIT) with a \$50 million one-time allocation paid into a Regional Account. SIDIT has the full powers and capacity of an individual and is not an agent of the government. The objective of the SIDIT is to help grow and diversify the economy of the Southern Interior of British Columbia through economic development initiatives. (SIDIT 2013)

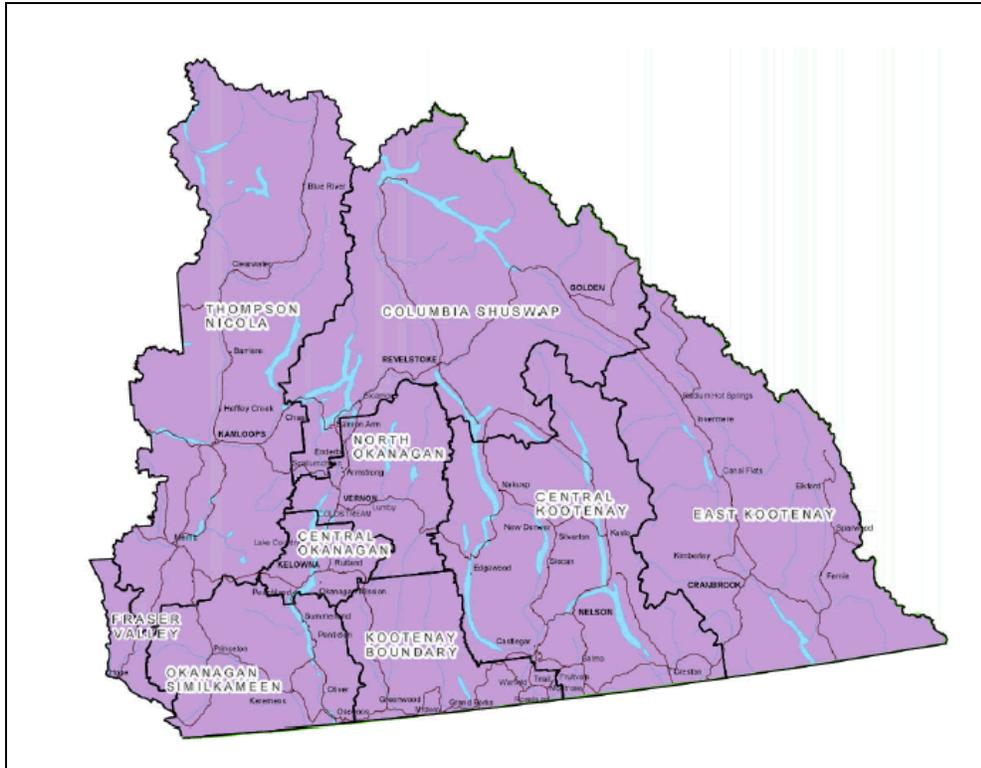
Service Area

As illustrated in

Figure 8, the SIDIT service area is located in the southeastern region of British Columbia and includes nine regional districts:

- 1) Fraser valley RD (portion east of Hope, including Hope);
- 2) Thompson Nicola RD (excluding the western most incorporated communities of Clinton, Cache Creek, Ashcroft, Logan Lake, and Lytton and neighbouring electoral areas);
- 3) Okanagan Similkameen RD;
- 4) Kootenay Boundary RD;
- 5) Central Okanagan RD;
- 6) North Okanagan RD;
- 7) Central Kootenay RD;
- 8) East Kootenay RD; and,
- 9) Columbia Shuswap RD.

Figure 8: SIDIT Service Area



Source: SIDIT (2013)

Mandate

The objective of the SIDIT is to help grow and diversify the economy of the Southern Interior of British Columbia through economic initiatives in 10 key sectors including: agriculture, economic development, energy, forestry, mining, Olympic opportunities, pine beetle recovery, small business, tourism, and transportation. The mandate is guided by SIDIT’s vision statement which is outlined in Figure 9 below.

SIDIT strives toward a future where economic opportunities are enabled, providing long-lasting measurable benefits to communities; where regional investment creates significant positive impacts across the region while smaller communities are given opportunities to remain or become economically sustainable; where there is a strong and diversified economy in the Southern Interior that supports the development of viable, healthy, vital and sustainable communities throughout. (SIDIT 2013)

SIDIT’s goal is to maintain the Trust so that it is sustainable, providing continual support for economic initiatives for the Southern Interior and increasing the value of the Trust over time through return on investment. (SIDIT nd)

Figure 9: SIDIT Vision Statement

The SIDIT vision is:

- A future where economic opportunities are enabled, providing long-lasting measurable benefits to communities
- A future where regional investment creates significant positive impacts across the region while smaller communities are given opportunities to remain or become economically sustainable
- A future where there is a strong and diversified economy in the Southern Interior that supports the development of viable, healthy, vital and sustainable communities

Source: SIDIT (nd)

Governance

Governance of the Trust is the responsibility of a 13 member Board of Directors. Four directors are appointed by each of two Regional Advisory Committees (RACs) representing the Columbia Kootenay and Thompson Okanagan regions. The remaining five directors, all of which are from the Trust area, are appointed by the provincial government. RAC membership is comprised of local government elected officials and members of the Legislative Assembly from the region.

The Board is responsible for making strategic investment in support of a variety of regional economic priorities, as well as for other opportunities that they deem will contribute to the economic diversification of the Southern Interior. In setting up the Trust, it was the expectation of the Provincial government that the Board would use the funds to develop partnerships and leverage investments with the private sector and other government partners, including First Nations. (SIDIT 2013)

The guiding principles of SIDIT include:

- **Sensitive** to the cultural uniqueness and diversity of the population of the Southern Interior
- **Accountable** to the public for all of SIDIT's activities and **transparent** in all of our processes, decisions and reporting
- Treat everyone with **respect** and **dignity**
- Support only those projects that comply with all applicable **environmental** legislation
- Support projects that **add value** to the communities and regions of the Southern Interior
- **Responsive** to the needs and aspirations of the people and communities in the Southern Interior
- Maintain a **sustainable** Trust that can provide **ongoing support** for economic initiatives for the Southern Interior
- Encourage investment in the Southern Interior through **leveraging** and by acting as a catalyst
- Support the creation, preservation and/or enhancement of **employment** in the Southern Interior

- To the best extent possible, ensure that all regions of the Southern Interior have **fair and equitable access** to the SIDIT Funds
- Support economic **diversification** and **sustainability** within Southern Interior communities
- Support and create **sound, economically viable communities**

SIDIT also operates with three committees including:

- Finance Committee comprised of three Directors and is responsible for the development and implementation of SIDIT's Market Investment Strategy, as well as for ensuring the fiduciary responsibilities of the Trust are properly carried out.
- Management Committee comprised of representatives from both the Thompson-Okanagan and Columbia-Kootenay regions and oversees the operational management of the Trust.
- Audit Committee is responsible for identifying appropriate candidates to serve as the financial auditor for the Trust as well as for overseeing the Trust's annual financial audit process. (SIDIT nd)

Structure

As mentioned above, SIDIT is guided by a board of elected local government officials and members appointed by the Provincial Government and who reside in the Trust region. The board is supported by four staff members who are based in Vernon, British Columbia. (SIDIT nd)

Key Operational Activities

SIDIT provides two broad types of funding:

- 1) **Loans/equity** financing for business ventures that meet our objectives and criteria
- 2) **Grant funding** for programs and projects including:
 - **Educational Initiatives:** Funding in support of trades, technology, academic, innovation and entrepreneurship programs delivered through the British Columbia Innovation Council and participating post-secondary institutions in the Southern Interior.
 - **Community Economic Initiatives:** Funding in support of community investment that creates economically sustainable communities.

The amount of funding available is subject to annual review by the Board and will vary from year-to-year based on various factors: Loan/equity investments depend on the amount of funds available in the investment pool, as well as the current make-up of the investment portfolio.

The Trust's funding policy sets maximum limits on how much can be invested into companies at

various stages of development, both on an individual basis and as a percentage of the total investment pool. Grant funding is generated from the Trust's income stream and is dependent upon SIDIT's investment returns and operational performance.(SIDIT nd)

C.1.4 Island Coastal Economic Trust

History

On September 22, 2005 the provincial government introduced new legislation that created a \$50 million North Island-Coast Development Initiative Trust. The objective of the Island Coastal Economic Trust (ICET) is to help diversify the economy of the North Island-Coast by leveraging new investment and partnerships for economic opportunities. The Trust is to provide funding to create new and sustainable economic growth and jobs through strategic investment in targeted sectors with the regional economy. Communities control the Trust and make the decisions regarding the most prudent approach to realize economic benefits.

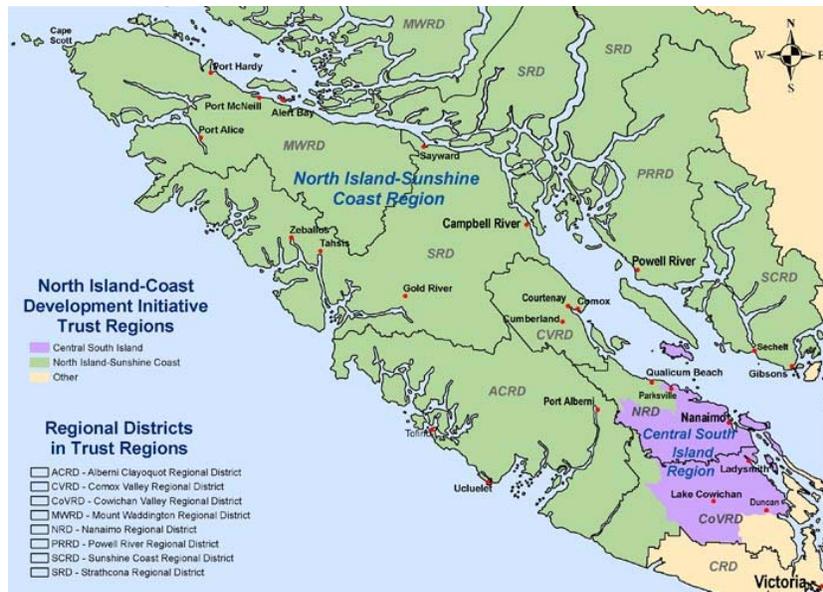
The overarching goal is to support regional decisions for economic development, complimenting the government's strategy to create prosperity for all people in every region of the province. ICET funds strategic partnership investments to further develop and diversify the economic base of the North Island-Coast region. Bill 7 was proclaimed on February 27, 2006. (ICET 2013)

Service Area

As illustrated in Figure 10, the service area for ICET includes communities north of the Malahat on Vancouver Island and on the Sunshine Coast. The Regional Districts in the ICET service area include:

- Alberni-Clayoquot RD;
- Comox Valley RD;
- Cowichan Valley RD;
- Mount Waddington RD;
- Nanamio RD;
- Powell River RD;
- Sunshine Coast RD; and,
- Strathcona RD.

Figure 10: Island Coastal Economic Trust Service Area



Source: ICET (2013)

Mandate

The objective of ICET is to be a catalyst to build a diverse and sustainable Island and Coastal economy. The key sectors that ICET focuses on includes: forestry, transportation, tourism, mining, small business, economic development, agriculture, aquaculture, and energy (ICET. Nd.a). The mandate is guided by ICET vision statement which is outlined in Figure 11

Figure 11: ICET Vision Statement

The North Island and Sunshine Coast is a more diversified, globally competitive regional economy.

Source; ICET (2013)

ICET has three core goals including:

- The investment goal of ICET is to leverage development and diversification investments in the economies of the regions. For every dollar the Trust invests, it expects that an additional \$3 will be invested.
- ICET will be managed judiciously consistent with the intent of the Act, Mission, and Goals with an emphasis on sound strategic and operational planning and will be responsive to changing circumstances and opportunities.
- Preference will be given to partnerships and leveraged investments that achieve the project economic and diversification impacts for a broader region, with a bias for projects



which have a broad regional impact while recognizing that local benefits of projects are also valuable. (ICET nd.a)

Governance

ICET is governed by 13 Directors, 8 of which are appointed by two Regional Advisory Committees (RACs) representing the Central South Island region and the North Island-Sunshine Coast region. The remaining 5 directors are appointed by the provincial government. The RACs are comprised of the mayors within the regions, the chairs of each regional district and the members of the Legislative Assembly from the region.

The RACs are established to provide advice to ICET on projects. Each RAC may identify projects that the RACs consider are appropriate for application of the money in the Regional account. (ICET 2013)

Overall, the Board is responsible for ensuring internal controls are in place so that performance information is measured and reported accurately and in a timely fashion. In addition, the Board presents measures that are consistent with ICET's mission, goals and objectives. (ICET.nd.b)

Structure

As mentioned above, ICET is guided by a board of elected local government officials and members appointed by the Provincial Government and is provided with input from two regional advisory committees. The work of the Board is supported by a staff of two with the Chief Executive Officer based in Campbell River. (ICET 2013)

Key Operational Activities

ICET invests its funds primarily through its two grant programs, the Economic Infrastructure Program and the Economic Development Readiness Program which includes:

- **The Economic Infrastructure** program supports the development of a wide range of economic diversification infrastructure projects in target sectors, with non-repayable matching contributions up to a maximum of \$40,000.
- **The Economic Development Readiness** program provides up to \$30,000 in non-repayable matching funding contributions to support the growth of economic development readiness in communities of all sizes. (ICET. 2013)

Given that ICET has spent most of its \$50 million, the fund has focused primarily on the economic development readiness program with modest financial contribution. A key operational activity outlined in the recent strategic planning is making a request to the Province for long-term funding (ICET.nd.a).

C.2 Institutions and Networks

C.2.1 Community Development Institution at University of Northern British Columbia

History

Community Development Institution (CDI) at University of Northern British Columbia (UNBC) was created in 2003 (UNBC 2013). The CDI produced its first annual report in 2004 covering activities for January to December of that year (UNBC nd.a).

Service Area

CDI is focused on Northern BC's rural and small town communities with projects and consulting assignments focused in northern and central British Columbia. (UNBC 2013)

Mandate

The mission of CDI at UNBC is to support the research, information, and development needs of northern BC's rural and small town communities as they adjust to change in the new economy. The CDI is interested in two fundamental issues for northern BC's communities: Community capacity and community development. By undertaking research, sharing information, and supporting community outreach, the CDI has become a vital partner to communities interested in making informed decisions about their own futures.

Governance

All research institutes at UNBC are required to operate with an internally appointed management committee and an externally appointed advisory committee, CDI is no different. Committee membership expectations are noted below:

Internal Management Committee:

- Vice-President (Research) - Chair Director of Regional Operations
- Canada Research Chair in Rural and Small Town Studies
- One faculty member appointed from CASHS
- One faculty member appointed from CSAM Institute Director (ex-officio)

External Advisory Committee:

- One representative from North-Central Municipal Association
- One representative from the Northern Chapter of the BC Chambers' of Commerce
- One representative from the BC Ministry of Community, Aboriginal and Women's Services Community Transition Branch

Representatives from the federal Rural Secretariat's BC Team including:

- One First Nations representative
- One small business representative
- One voluntary sector representative
- One community college representative
- Institute Director (ex-officio)

Both the Internal Management Committee and the External Advisory Committee provide advice to the Institute Director on strategic planning and new program development opportunities. The management committee meets on a quarterly basis. The advisory committee meets annually. An annual report of the activities of the Institute, including an audit statement, is presented to the University Senate each year. (UNBC 2013)

Structure

The CDI at UNBC functions under the direction of an Institute Director. The Director is supported by administrative and research assistants. The Institute is also available to house short-term visiting scholars. Postdoctoral fellows would be welcomed but would need to be affiliated with an Academic Program.(UNBC 2013)

The Institute plan envisions open access to participation. This can include participation by UNBC faculty members as well as others interested and qualified. Mechanisms for Institute membership are as follows:

- Informal collaboration on research projects.
- All tenure track UNBC faculty are eligible to apply for membership through the Internal Management Committee on the criteria that they are bringing assets to the Institute (such as research project funding).
- A broader category of Research Fellows would also be eligible to apply for membership through the Internal Management Committee on a renewable limited term basis on the criteria that they are bringing assets to the Institute (such as collaborative relationships with other organizations).
- Post-doctoral and Visiting Fellows would be eligible to apply for limited term memberships directly to the Director of the Institute and on the recommendation of an academic program head where they will be housed within the University. (UNBC 2013)

In addition, CDI also undertakes several for-fee consulting assignments in specific communities and organizations each year.

Key Operational Activities

The Community Development Institute at UNBC focuses on three core foundations including:

- **Research** – Balancing both applied and basic work so as to maintain academic credibility and to be of practical relevance to communities;
- **Outreach** – Building upon a "extension" tradition to connect research and training opportunities with community needs and to translate best practices and leading scholarship into applied tools for rural and small town places;
- **Education** – Creating community capacity through a close connection between the university curriculum, opportunities under continuing education and regional offerings, and connections with the northern colleges and with specialized centres for delivery of education and training programs.

In addition, the Community Development Institute at UNBC emphasizes the following:

- **Capacity Building** – Through opportunities in training and information sharing, the Institute created community development capacity 1) among UNBC undergraduate and graduate student population, 2) with in-service professionals, and 3) with community members. Capacity transfer to northern communities and residents is a central goal.
- **Collaboration** – Involves mutual working relationships so that each party (whether government or community group) benefits from interaction with the Institute.
- **Complementarity** – In terms of complementarity, shared interests between UNBC research institutes provides a foundation for wider study of topics which will feed directly into the outreach activities of the Institute by creating information and products relevant to rural and small town communities.
- **Classroom/Community Service Learning** – Opportunities are also made available by coordinating community needs with classroom teaching opportunities for UNBC faculty and students. (UNBC 2013)

C.2.2 Selkirk College Columbia Basin Rural Development Institute

History

In 2010, CBT and Selkirk College announced the establishment of the Columbia Basin Rural Development Institute (CBRDI), which is focused on promoting and supporting informed planning and decision-making in the Columbia Basin through region-specific information and applied research. (CBT. 2013)

Service Area

The CBRDI is housed at Selkirk College and provides services to the Columbia Basin area which is located in the southeast corner of British Columbia, the Basin Boundary region includes the Regional Districts of East Kootenay, Central Kootenay, Kootenay Boundary (The Kootenay Development Region), in addition to Revelstoke, Golden, Valemount and Columbia Shuswap Regional District Areas A and B. (CBRDI 2013)

Mandate

“A key goal of CBRDI is to support local communities in identifying and meeting their priorities, and in particular, to ensure communities have access to meaningful and relevant information. To that end, the CBRDI is a regional centre of excellence in applied research and information provision focused on strengthening rural communities in the Columbia Basin Boundary region of British Columbia. The CBRDI conducts and gathers research, provides analysis of that research and shares that information through the RDI website so that Columbia Basin Boundary communities have a resource to inform planning and decision making in their communities and region. (CBRDI 2013)

Governance

The CBRDI is jointly governed by Selkirk College and CBT. In addition, the CBRDI receives advice from East Kootenay and West Kootenay/Boundary Advisory Committees. The Advisory groups meet two times per year, once in their sub-region and once jointly using video conferencing technology. The advisory groups are in place to:

- Advise on Research Priorities – help identify rural revitalization issues and related research needs;
- Transfer Knowledge – help to support dissemination of research findings and outcomes;
- Support Collaboration – connect the CBRDI with key stakeholders & recommend partnership opportunities; and,
- Monitor & Advocate – promote the role and impact of the CBRDI. (CBRDI 2013)

Structure

The RDI is supported through a partnership between CBT and Selkirk College. Columbia Basin RDI is funded by CBT through an 8-year partnership agreement and through Selkirk's support through its infrastructure and specific capabilities, including the Regional Innovation Chair in Rural Economic Development (RIC) who serves as the CBRDI Lead Researcher. In addition, the Selkirk Geospatial Research Centre provides complementary expertise, access to data and state-of-the-art GIS and other research tools and skills to the CBRDI.

In general, the CBRDI collects, analyzes and reports up-to-date community information so residents and leaders can make informed decisions. The CBRDI also studies and shares information on “best practice” tools and processes to help improve local economic development. Drawing on the expertise of the Regional Innovation Chair in Rural Economic Development this focus area is focused on the provision and testing of related best practice tools and approaches using an applied research model. Finally, the CBRDI works closely with regional innovation councils to broker and support related knowledge transfer and innovation research partnerships to support local businesses. (Selkirk College 2013)

Key Operational Activities

The research areas undertaken by CBRDI are focused on four specific initiatives including:

- **State of the Basin** is an indicator and monitoring program developed to collect, analyze and report on information for the purpose of providing an up-to-date picture of the well-being of the Basin and an understanding of trends over time. An analysis of indicators data is provided on an ongoing basis to ensure residents and community leaders have access to research that supports informed decision-making.
- **Regional Rural Revitalization** draws on the experience of the Regional Innovation Chair in Rural Economic Development, with a focus on the provision and testing of related best practice tools and approaches using an applied research model.
- **Innovation and Knowledge Transfer** works closely with the regional innovation councils. This focus area aims to foster innovation and knowledge transfer by brokering and supporting related research partnerships.
- **Adopting Digital Technologies sees CBRDI** implementing a 14-month program (January 2013 to February 2014) to help small and medium-sized enterprises (SMEs) to develop their business by fulfilling some of the needs that arise in the adoption of digital technologies. (CBRDI 2013)

CBRDI also is involved in supporting a resource database that includes a variety of reports and resources for the Columbia Trust area. Currently 48 documents are contained on line with examples including:

- **Productivity & Productivity Tools Report**, which is an economic program which provides a literature review on productivity drivers and productivity improvement best practices.

- **Lake Windermere Foreshore Inventory and Mapping**, an environmental report whose results show that railway, residential, private recreational, parks and commercial uses have compromised the integrity of over half the foreshore inventory;
- **The 4th Annual Report Card on Homelessness for Nelson, B.C.**, a social report that documents the state of poverty and homelessness in Nelson;
- **Productivity Project Business Engagement Report**, an economic report that presents the findings from a series of focus groups with SMEs in the Kootenay Boundary area. (CBRDI 2013)

Finally, RDI Connect is the dissemination source that focuses on providing research updates, news and trends.

CBRDI is also currently piloting a Business Retention and Expansion (BR+E) project. This project aims to help Columbia Basin communities better understand the needs of local businesses and the challenges they face. The first partner communities/organizations to pilot the BR+E included Greater Trail, Boundary, the Kootenay Association for Science and Technology and the Kootenay Rockies Innovation Council. Another three communities (Golden, Nakusp, and Slocan Valley) have initiated their own BR+E pilots and are moving forward with data collection this winter.



C.2.3 BC Rural Network

History

The BC Rural Network (BCRN) was formed in 2004 to enhance the capacity of rural British Columbia to develop responses to rural and remote community issues (BC Rural Network 2013). The preliminary work to create BCRN was conducted by a working Group that consisted of Community Futures Development Association of BC, BC Community Economic Development Network, Fraser Basin Council, and Pacific Community Network Association with assistance from the Canadian Rural Partnership's *Rural Community Capacity Building* program (BCRN 2005).

Service Area

The Network dialogues with rural communities and organizations across British Columbia through a series of annual regional forums, the Biennial BC Rural Communities Summit, an annual province-wide Members' Workshop, an e-mail list, regular newsletters, and website. (BCRN 2013)

Mandate

The BCRN aims to build stronger rural and remote communities in British Columbia by promoting better understanding of rural issues across all jurisdictions, and developing responses to rural issues. The BCRN aims to achieve this by:

- Acting as a coordinating body for the dissemination of information, tools, and resources of importance to rural and remote communities in British Columbia.
- Acting as a catalyst to build linkages between communities, rural organizations, and policy-makers who work on issues of importance to rural and remote communities in British Columbia.
- Improving awareness of the current work of existing rural groups and organization in British Columbia by providing a forum for rural and remote communities and organizations to voice concerns and issues, and learn from each other. (BCRN 2013)



Governance

The BCRN takes direction from the BCRN Board of Directors. The Board of Directors are appointed by the general membership and from the general membership. Overall, the BC Rural Board of Directors is made up of 12 members including one member from each of the six regions:

- Cariboo Chilcotin;
- Kootenay;
- South Coast, Vancouver Island, & Gulf Islands;
- Thompson Okanagan;
- Peace Omineca; and,
- Northwest.

Additionally, one seat on the Board is designated for an Aboriginal representative, two seats are designated by youth representatives, and up to one representative from the Fraser Basin Council. General membership is open to all organizations that serve a rural constituency, and/or whose mandate is concerned with issues of interest to rural citizens and communities. All members of executive and legislative branches of government including provincial, federal, municipal, and regional are also eligible for membership. Finally, any individual from the community at large with an interest in rural community issues may also take out a membership. (BCRN 2012)

Structure

The BCRN is a registered non-profit society in the Province of British Columbia. The BCRN is a coalition of organizations, communities, and individuals who share a commitment to building the capacity of British Columbia to develop responses to rural and remote community issues. BCRN has an office located in Williams Lake.

Key Operational Activities

In addition to the core activities which include annual regional forums, the Biennial BC Rural Community Summit, annual member's workshop, and other communications activities, BCRN has recently launched a new initiative to attract young people to rural communities.

This initiative is called Project Comeback and was launched with help from the Fraser Basin Council to engage youth and enable them to make a permanent home in rural communities. Project Comeback is piloted in five BC communities (four currently confirmed)—City of Williams



Lake, Smithers, Village of Chase, and Regional District of Mount Waddington—and will run over a two year period. (BCRN 2013)

Appendix D – Rural Development Research Institutes

Although beyond the scope of this paper there are a plethora of Canadian and US university based research institutes that conduct and publish research on rural development issues. Some of the more relevant institutes include:

- 1) Rural Development Institute – Brandon University (see www.Brandonu.ca/rd/)
- 2) The Rural and Small Town Programme – Mount Allison University (see www.mta.ca/rstp)
- 3) Alberta Centre for Sustainable Rural Communities (see www.augustana.ualberta.ca/research/centres/acsrc)
- 4) Canadian Rural Research Network (see www.rural-research-network.blogspot.ca)
- 5) Canadian Rural Revitalization Foundation (see www.crrf.ca)
- 6) Rural Research Centre – Faculty of Agriculture Dalhousie University (see www.dal.ca/faculty/research/centres-and-labs-/rural-research-centre)
- 7) Alberta Rural Development Network (see www.arda.ca)
- 8) California Center for Rural Policy (see www.humboldt.edu/ccrp)
- 9) Community and Rural Development Institute – Cornell University (www.cardi.cornell.edu)
- 10) Carsey Institute University of New Hampshire (see www.carseyinstitute.unh.edu)
- 11) Harvard Project on American Indian Economic Development (see www.hapied.org)
- 12) North Central Region For Rural Development Iowa State University (see www.ncrcrd.iastate.edu)
- 13) Centre for Remote and Rural Studies, University of the Highlands and Islands (see www.CITS.uhi.ac.uk)
- 14) Centre for Rural Policy Research, University of Exeter (see www.socialsciences.exeter.ac.uk/research/centres/crpr)

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Appendix F – Personal Communications

Andrews, Tanya. New Dawn Enterprises, Sydney NS. Email communications September 20, 2013.

Decker, Michelle, Chief Executive Officer, Rural Action in Ohio. Telephone and e-mail conversations on September 27, 2013.

McDaniel, Brenda, Chief Financial Officer. Kentucky Highlands Investment Corporation, email communications September 18 and 20, 2013.

Miller, Kathy Program Director, Rural Policy and Research Institute, telephone conversation August 29, 2013.

Morford, Shawn, Regional Coordinator/Program Evaluation Manager. Rural Development Initiatives Inc. in Oregon. Email communications August 20th and September 17th, 2013.

Powell, Marie. Communication Associate. Center for Rural Affairs, telephone conversation September 9, 2013.

Timeche, Joan, Executive Director, Native Nations Institute, Email communication on November 22, 2013.

Wall, Milan Co-Director, Heartland Center for Leadership Development, telephone conversation September 6, 2013