



Investing in First Nations in British Columbia

NRT Strategic Plan 2011-2014





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New Relationship Trust
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VISION:

A British Columbia where First Nations have efficient and effective governments, vibrant cultures and languages, social justice, and economic prosperity.

MISSION:

Investing in First Nations in British Columbia.

GUIDING PRINCIPLES:

- Respect for First Nations' decision-making authority
- Fairness and Equity
- Transparency and Accountability
- Sustainable Management of the fund

In addition to the Guiding Principles above, in providing resources to First Nations in BC NRT will:

- Reflect the intent and purpose of the New Relationship vision
- Support Nation re-building
- Communicate effectively with First Nations in BC
- Encourage First Nation participation in NRT's activities and initiatives
- Not replace or duplicate existing Government or First Nation programs
- Leverage NRT funds wherever possible
- Increase the investment fund in order to provide more benefit
- Balance spending with investment to ensure support is available for future generations

INTRODUCTION

The New Relationship Trust (NRT) was created in 2006 as a response to the call for a new relationship between First Nations and the government of British Columbia. In its inaugural year, NRT set the stage for a future strategic direction by engaging with First Nation communities around the province regarding their needs and priorities. NRT's first Strategic Plan was directly based on the feedback received during that engagement process.

The 2006 Engagement Sessions established a clear mandate and strategic direction for NRT. In particular, NRT was directed to:

- Ensure the fund is available to support future generations by balancing spending with investment; and
- Support capacity building for First Nation communities in five priority areas: Governance, Education, Language & Culture, Youth & Elders, and Economic Development.

Each year, NRT continues to seek community input in order to refine and expand on the strategic direction established during the 2006 Regional Engagement process. Surveys are conducted annually, and in the fall of 2009, NRT conducted a second series of Regional Engagement Sessions, hosting meetings in 10 locations around BC.

Feedback received in 2009 and throughout the proceeding year reaffirms NRT's overall mandate and strategic priorities:

- Governance (capacity-building)
- Education
- Language & Culture
- Youth & Elders
- Economic Development

The 2011 - 2014 Strategic Plan builds on the successes of NRT to date and integrates feedback from First Nation communities regarding their needs and priorities.

JOINT MESSAGE FROM THE CHAIR AND CEO

2010 ended on a high note for NRT, with the success of the national Young Entrepreneurs Symposium (YES) held in Vancouver. More than 120 young Aboriginal entrepreneurs and aspiring entrepreneurs attended the three-day event, and much fun was had by all. More importantly, YES gave our leaders of the future a once-in-a-lifetime opportunity to develop business skills, network with peers and learn from mentors. YES embraced the spirit of NRT: investing in First Nation communities and individuals to build capacity and ultimately, create stronger Nations.

Looking forward, we are very excited to begin the new year. NRT has a new Board – with two outgoing and two new Directors. As always, new Board members lend a fresh perspective to what we do at NRT. This year, we are pleased to be joined by George Saddleman of the Sylix Nation and Hugh Braker of the Tseshah Nation. We say farewell, and extend a warm thank you, to outgoing Board members Gloria Morgan and Leona Sparrow.

Together with NRT staff the new Board will shape and refine NRT initiatives to provide support to First Nations where it is most effective. We will continue to invest in the five strategic areas of Education, Language & Culture, Youth & Elders, Governance Capacity, and Economic Development. These were the original priorities identified by First Nation communities in 2006, and they continue to be the most critical elements for Nation rebuilding.

Within these priority areas, we are introducing some new initiatives and refining others to better support community needs. For example, this year we will be building on the success of the Entrepreneur Equity Matching Initiative (EEMI). Introduced last year, EEMI assists First Nation entrepreneurs to access financing for their businesses. The EEMI proved very successful last year; \$300,000 of NRT's dollars allowed 73 new and existing businesses to leverage more than \$3.5 million. This year, we will introduce equity matching support for First Nation community-owned businesses, on a trial basis.

Another NRT initiative that is growing is the Scholarships and Bursaries Initiative. Here, in response to your feedback, we will be increasing the number of bursaries allotted. Also, we will be looking to create a Scholarship Foundation to manage and grow this initiative.

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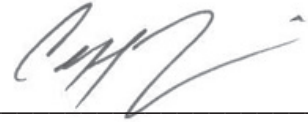
NRT Strategic Plan 2011-2014

You'll be able to read about new initiatives and changes in the NRT newsletter and on our website, which is getting a fresh new look right now. We are working to make NRT information clear and easy to access. And of course we want to continue to get your input. Throughout 2011, we'll post a feedback surveys on our website, and we encourage you to share your thoughts and help us set a strategic course for the future.

Yours respectfully,



Kathryn Teneese
Chair, Board of Directors



Cliff Fregin
CEO

STRATEGIC DIRECTION

NRT will continue to invest in First Nations in BC by supporting efforts in five key areas. In 2011-2014, NRT will support First Nation capacity building by:

- Enhancing capacity within First Nation **governance**
- Encouraging access to **education**
- Assisting First Nations in BC to protect and revive their **languages and cultures**
- Supporting initiatives that engage **youth and Elders**
- Fostering and advancing **economic development** opportunities

GOVERNANCE

“Enhancing capacity within First Nation governments”

NRT defines capacity as the knowledge, abilities, skills, and processes First Nation governments require in order to create successful, vibrant, independent and self-sustaining communities.

NRT’s capacity building strategy has the following components:

- Direct Support to First Nations
- Policy Development
- Tools and Resources

Direct Support to First Nations

NRT will provide direct support to First Nations and their communities for local capacity building and policy development. Preference may be given to initiatives that facilitate collaboration amongst communities where feasible, and therefore support Nation building.

Eligible projects include:

- Land use planning, including traditional use studies
- Comprehensive community planning, including economic development planning
- Governance capacity development, including support for human resources, knowledge and systems required to build strong governments

Policy Development

NRT will support policy development work at a provincial level in order to create and disseminate policies and related initiatives that directly benefit First Nation communities throughout the province.

Policy initiatives supported may include:

- Research and business case development to support policy and legislative initiatives
- Province-wide models / principles to organize First Nations, government and industry, and to support business partnerships, negotiation and revenue and benefit sharing
- Support for organizations working at a provincial level to develop policy in areas of importance to First Nations in BC

Tools and Resources

NRT will support the development and dissemination of tools and resources that help First Nations in BC and their communities build capacity. NRT will continue to promote the First Nations in BC Web Portal (www.fnbc.info), which is an online databank for capacity-building tools, best practices and resources. Other capacity building resources may include:

- Best Practices
- Negotiating tools and templates
- Case Studies
- Specific studies and research
- Workshops and information sessions

EDUCATION

“Encouraging access to education”

Education is a key to independence for First Nations. Assisting First Nation youth and individuals to pursue and complete secondary and post-secondary education is a high priority for NRT.

The NRT education strategy has four key components:

- Creation of a Scholarship Foundation to attract private and public contributions
- Scholarships and bursaries for post-secondary students
- Employment incentives for the hiring of post-secondary students
- Support for First Nation communities for K-12 initiatives

NRT Scholarship Foundation (NEW!)

NRT will create a scholarship foundation that will issue tax receipts to companies and individuals who contribute funds towards scholarships for First Nation students from BC. The fundraising efforts of the scholarship foundation will enhance the existing NRT Scholarship and Bursaries initiatives.

NRT Scholarships and Bursaries

NRT will continue to provide scholarships and bursaries to assist First Nation students in achieving post-secondary education goals. This program awards funding based on qualification criteria and the student's proposed contribution back to First Nation communities.

- Scholarships will be awarded for students pursuing undergraduate, Masters and PhD degrees
- Bursaries will be awarded for certificate, diploma and trades programs

NRT will continue to partner with First Nation, public and private scholarship organizations in the province to reach more First Nation students.

Post-Secondary Student Employment Incentive

NRT will provide grants to First Nation governments, communities, and/or organizations to hire First Nation post-secondary students into a capacity building employment opportunity.

This initiative has three objectives:

- To build capacity in First Nation communities and/or organizations
- To give First Nation post-secondary students an opportunity to gain experience relevant to their fields of study
- To assist First Nation students in financing their continuing education

Supporting K-12 initiatives

NRT will support initiatives that increase the First Nations high school graduation rate. Initiatives may include support for special projects, tutoring, school supplies and books. Emphasis will be placed on support in the areas of English, math and sciences within K-12 grades.

LANGUAGE & CULTURE

“Protecting and reviving languages and cultures”

Sixty percent of the First Nation languages in Canada are spoken in BC. With 10 First Nation language families and more than 30 dialects, BC is the most diverse province in the country. However, many of these indigenous dialects are in danger of being lost. Preservation of First Nation languages and cultures builds self-identity and enhances cultural pride. Under this strategic direction, NRT has prioritized language revitalization due to the current crisis facing First Nation languages in BC.

NRT’s Language and Culture strategy will support:

- Preservation and revitalization of First Nation languages
- Initiatives that promote and revive First Nations’ cultural and artistic traditions
- First Nation language teachers in BC

Language

In partnership with First Peoples’ Heritage, Language and Culture Council (FPHLCC), NRT will continue to support the revitalization and preservation of First Nation languages in British Columbia. Language initiatives may include:

- Enabling First Nations to record, archive and share their languages
- Creating language and cultural immersion environments for all ages within the community/Nation
- Developing language and culture authorities within Nations
- Supporting First Nation language teachers in the field and/or certification of teachers

Culture

NRT will continue to support and promote First Nations’ arts and culture through the FPHLCC. Types of initiatives may include:

- Apprenticeship and mentoring programs for artists and arts administrators
- Initiatives that promote First Nation arts and cultural activities

YOUTH & ELDERS

“Supporting initiatives that engage Youth and Elders”

The inclusion of youth and Elders is essential to strong, healthy First Nations. Elders hold the wisdom of past generations; youth provide the key to a healthy and vital future.

Based on feedback received in recent years, we will focus support on community-based projects, activities and events for youth and Elders.

Youth

NRT will continue to support projects for youth at the community level that:

- Strengthen youth leadership
- Build capacity for youth
- Promote mentorship for youth

Elders

NRT will continue to support projects for Elders that:

- Assist groups, communities and organizations representing First Nation Elders in British Columbia, including the annual Elders Gathering
- Develop and deliver projects at the First Nation community level
- Benefit and build capacity for Elders

ECONOMIC DEVELOPMENT

“Fostering and advancing economic development opportunities”

Healthy First Nation communities require a sustainable level of prosperity to achieve their goals and support their programs. By taking advantage of economic development opportunities – both provincially and locally – First Nations can and are beginning to prosper.

In 2007, First Nations began work to develop a province-wide First Nations’ Economic Development Strategy with input from First Nations, the Leadership Council, government, and industry. NRT is working within this framework to facilitate economic development opportunities for member communities.

NRT’s Economic Development strategy has three focus areas:

- BC First Nations Equity Fund
- Entrepreneur Equity Matching Initiative
- Participation in the BC First Nations Economic Development Working Group

BC First Nations Equity Fund

In March 2010, the BC First Nations Equity Fund Limited partnership was launched jointly by NRT, All Nations Trust Company (ANTCO) and Nuuchahnulth Economic Development Corporation (NEDC). Initially, this equity fund will concentrate on providing financing to First Nations in BC that are involved in alternative energy projects within the province. Together with the other partners, NRT will continue to work on building a \$50M equity fund for First Nations in BC to support partnerships and involvement in viable business projects.

Entrepreneur Equity Matching Initiative

In 2010, NRT launched the Entrepreneur Equity Matching Initiative (EEMI) to support First Nation entrepreneurs in BC by partnering with BC Aboriginal Capital Corporations (ACCs) to provide matching equity for new or expanding businesses in the province. This exciting opportunity assists entrepreneurs in obtaining financing for their businesses, as well as assisting ACCs in identifying new lending opportunities in their service areas.

In 2011, NRT will expand the EEMI to extend equity matching to First Nation community business projects in BC. This new Equity Matching Initiative will be launched on a trial basis for the first year.

BC First Nations Economic Development Working Group

NRT will continue to participate in a provincial working group tasked with overseeing the Action Plan for the BC First Nation Economic Development Strategy. NRT will support partnerships that increase the capacity of the First Nations in BC in regards to economic development. Related work could include research, policy development, advocacy and gathering baseline information regarding First Nations' economic conditions.

INVESTMENT

The recent 2009 Regional Engagements Sessions and 2009 feedback survey confirmed the original direction given by BC First Nations in 2006; which was NRT should maintain a sustainable investment fund so that future generations of First Nation people will benefit.

Investing

NRT's investment strategy consists of short-term and long-term investments. The short-term investment strategy preserves capital by investing in safe and liquid investments. This in turn allows for funding stability. The long-term investments are allocated according to the following range of target asset mixes:

Asset Type	Minimum	Benchmark	Maximum
Fixed Income	20 %	40%	50%
Canadian Equities	20 %	30%	40%
Global Equities	20 %	30%	40%
		100 %	

In 2011 – 2014, NRT will investigate the viability of allocating up to 5% of its investment portfolio (Target Asset Mix) to invest directly into BC First Nation investment opportunities.

Fund Growth

A key goal of NRT's financial strategy is growing the investment fund in order to support sustainable and ongoing Nation re-building activities well into the future. Fund growth will be accomplished by establishing collaborative partnerships, leveraging program funds from government and other organizations, and other fundraising activities.

Spending

NRT's spending strategy is revised each year during the annual strategic planning session. Spending is dependent on returns on investment, leveraging and fund growth which differ from year-to-year.

Balancing the needs of First Nations and in recognition of the current economic

challenges faced by all, NRT has decided to retain its project spending budget of \$7 million for 2011 and to set targets for 2012/13 and 2013/14 of the same annual amount. These targets will be reviewed each year. Accordingly, NRT's 2011-2014 program spending strategy is as follows:

In \$millions	2011/12	2012/13	2013/14
Capacity	2.25	2.25	2.25
Education	1.75	1.75	1.75
Culture & Language	1.50	1.50	1.50
Youth & Elders	0.50	0.50	0.50
Economic Development	1.00	1.00	1.00
TOTAL	7.00	7.00	7.00

NRT's goal is to limit annual administrative costs to less than 2% of the investment portfolio.

Investment Governance

In order to demonstrate transparency and accountability, NRT established a *governance framework* for the investment of funds. Components of the framework are as follows:

- An independent, professional investment advisory firm was initially engaged to develop an investment policy and strategy and to assist in the selection of investment managers. The investment advisory firm reports to NRT quarterly regarding portfolio performance and Investment Manager changes
- A custodian firm has been engaged to hold the investments and provide independent accounting of portfolio transactions
- Expertise: three professional investment managers have been selected to manage the investment portfolio. Each Investment Manager manages one of the long-term components of the investment fund: either Fixed Income, Global Equities, or Canadian Equities
- Diversification: the investments are diversified amongst companies, geographic regions, strategies, and Investment Managers
- Re-balancing: the long-term portfolio is re-balanced quarterly, if necessary, to maintain NRT's long-term target asset diversification mix

COMMUNICATIONS

Accountability is one of NRT's guiding principles. In keeping with this principle, we perform a number of key communication tasks throughout the year that maintain a high level of accountability to all First Nations in BC and the Province.

NRT's areas of focus are the leaders and members of First Nations in BC and their communities, and the leadership of the Province of BC.

NRT will maintain a Communications Strategy that complements the Strategic Plan. The Communications Strategy will be updated annually.

Communication delivery

NRT employs a multi-faceted approach to communications to raise awareness and knowledge about NRT activities. Specifically, NRT:

- Publishes and distributes a three year Strategic Plan
- Prepares and publishes an Annual Report containing the audited financial statements, and annual performance results
- Promotes and creates awareness of opportunities for First Nations to benefit from NRT initiatives and programs
- Informs and educates First Nation and Government leaders about NRT's vision, mission and strategic initiatives
- Maintains a web site and uses technology to improve the overall effectiveness of NRT communications
- Publishes a periodic newsletter

Feedback gathering

As part of its annual strategic planning activity, NRT solicits feedback from First Nations in BC regarding program and funding priorities as well as management of the investment fund. Feedback is integrated into the Strategic Plan each year and is posted to the NRT web site for public information purposes.

Specific feedback gathering strategies are as follows:

- NRT will deliver an annual survey by mail, email, and/or telephone regarding program priorities
- NRT will perform focused surveys about a specific area of programming or operations as required
- NRT will perform a province wide engagement process every three years

RELATIONSHIP BUILDING

A number of NRT's guiding principles speak to the need for relationship building, both amongst First Nations and between First Nations and other agencies and governments. These principles include:

- Reflecting the intent and purpose of the New Relationship vision
- Supporting Nation re-building
- Not replacing or duplicating existing government or First Nation programs

Accordingly, NRT's strategy for relationship building includes the following tactics:

Partnering

NRT will establish and maintain partnerships with First Nations, public and private organizations that share common goals and values in order to leverage funds and minimize administrative costs. NRT's current partners are:

- First Peoples' Heritage Language and Culture Council (FPHLCC)
- First Nations Education Steering Committee (FNESC)
- First Nations Technology Council (FNTC)
- All Nations Trust Company (ANTCO)
- Nuuchahnulth Economic Development Corporation (NEDC)
- Tale'awtxw Aboriginal Capital Corporation (TACC)
- Tribal Resource Investment Corporation (TRICORP)
- First Nations Agricultural Lending Association (FNALA)
- Community Futures Development Corporation of Central Interior First Nations (CFDCCIFN)
- Northern Development Initiative Trust (NDIT)

Nation Re-Building

In order to support Nation re-building and cooperation amongst First Nation communities in BC, NRT will:

- Where possible within the existing strategic priorities, make support available to initiatives that foster cooperation between communities
- Where practical, ensure that information and outcomes of NRT support are shared amongst Nations

PERFORMANCE TARGETS

To ensure we are reaching our mandate and goals, NRT has established short, medium and long term measures to demonstrate success.

Short Term (1 – 3 years)

Governance

- Develop 5 Best Practice toolkits and facilitate training sessions to introduce them to BC First Nations. Develop and deliver 3-5 regional training sessions
- In partnership with interested parties, create a self-assessment tool to help First Nations in BC to self-determine where and how they wish to focus on governance capacity development
- Fund up to 8 projects per year in each of the following areas: Land Use Planning, Traditional Land Use Planning and Economic Development Planning;
- Fund up to 5 policy development projects per year for provincially mandated BC First Nation organizations
- In partnership with the First Nations Technology Council, introduce a fully functional Resource Centre web portal that provides relevant examples of governance capacity building
- By the end of year 3, secure up to 75% of the administrative and maintenance costs associated with the Resource Centre web portal

Education

- Create and distribute a brochure that showcases NRT scholarships recipients
- Assist up to 65 First Nation students with funding to attend post-secondary institutions, and up to 50 First Nation students per year in certificate and/or trades programs
- Attract an additional \$1 million for scholarships and bursaries for First Nations in BC through partnerships and leveraging
- Promote the hiring of First Nation graduates and post secondary students by establishing an NRT Education Database
- Create a BC First Nations scholarship foundation

Language and Culture

- Leverage an additional \$5 million in capital for First Nation language and culture initiatives from public and private sources
- In partnership, support the digital archiving of up to 20 BC First Nation language dialects

Youth and Elders

- Provide funding for up to 70 Youth projects per year
- Provide funding for up to 80 Elders projects per year
- Provide financial support to the annual Elders Gathering

Economic Development

- In partnership with the BC Aboriginal Capital Corporations, support up to 100 First Nation entrepreneurs and 10 First Nation communities in BC each year by matching equity for business start-ups and/or expansion of businesses within BC
- Support the implementation of the BC First Nation Economic Development Strategic Plan for British Columbia
- Provide equity participation loans for up to 5 projects through the BC First Nation Equity Fund

Investments

- Leverage new project funding at a goal of 2:1
- Maintain the investment fund at \$80 million by March 31, 2013
- Limit annual administrative costs to less than 2% of the investment portfolio

Partnerships

- Develop and maintain at least 6 partnerships / protocols with other First Nation organizations in order to promote collaboration and prevent duplication of products and services
- Initiate a minimum of 2 new partnerships per year

Investing in First Nations in British Columbia

NRT Strategic Plan 2011-2014

Medium Term (3 – 5 years)

- Support the First Nations leadership in BC to develop mechanisms that assist First Nations and the Government of BC to negotiate reform
- Initiate a First Nations equity fund to support economic development initiatives, with a goal of building a \$50 million BC First Nations Equity Fund
- Fundraise an additional \$50 million in capital for the capacity-building objectives of First Nations
- Maintain annual NRT project funding at a minimum of \$7 million

Long Term (5 – 10 years)

- Grow the Investment Fund to \$150 million by 2025
- Grow annual project funding to \$12 million per year by 2025



