Passionate Collaboration?

TAKING THE PULSE OF THE UK ENVIRONMENTAL SECTOR

Jon Cracknell, Florence Miller, and Harriet Williams

NOVEMBER 2013

Acknowledgements

Jon Cracknell works with the family of the late Sir James Goldsmith, helping to manage their philanthropic activity, which is principally carried out via the JMG Foundation and The Ecology Trust. Florence Miller, on maternity leave at the time of publication, is the coordinator of the Environmental Funders Network (EFN). Harriet Williams works for Goldsmith Family Philanthropy with Jon, and takes day-to-day responsibility for the work of The Manuka Club. Katy Scholfield, Phil Murray, and Heather Godwin provided valuable comments on the report. The report was designed by Pete Bishop (peter.bishop@tourismconcern.org.uk).

EFN has received grants, donations and in-kind support from a number of members. We are extremely grateful for this support, without which the network could not exist in its current form. In the 2012/13 financial year the following trusts and foundations provided financial support for the core operation of the network: Arcadia Fund, Edward Hoare Charitable Fund, Esmée Fairbairn Foundation, Freshfield Foundation, Polden-Puckham Charitable Foundation, Rothschild Foundation, Schroder Foundation, Tellus Mater Foundation, Tubney Charitable Trust, and the Waterloo Foundation.

The network is guided by a steering group chaired by Simon Brammer (Sainsbury Family Charitable Trusts), and including Nicholas Ford (Ernest Cook Trust), Gerardo Fragoso (Arcadia Fund), Harriet Gillett (Polden-Puckham Charitable Foundation), Hugh Raven (John Ellerman Foundation), Steph Stares (Waterloo Foundation) and Harriet Williams (Goldsmith Family Philanthropy). The authors would like to take this opportunity to thank them for their leadership and ongoing support.

We are very grateful to Professor Graham Smith, Dr David Clifford and their colleagues from the Third Sector Research Centre who wrote the report, *Mapping the environmental third sector in England*.[1] Their willingness to share data gathered during their research is much appreciated.

We are also very grateful to the chief executives of the environmental organisations that took time to answer the EFN survey, and whose opinions form the basis of this report. We would also like to thank the trusts and foundations within the EFN that endorsed the survey and lent their names to the email asking environmental groups to take part.

Finally we would like to thank the advisory group that provided input for the design of the survey that underpins this report. This comprised: Simon Counsell (Rainforest Foundation UK), Tony Juniper (former executive director of Friends of the Earth, England, Wales & Northern Ireland), Matthew Spencer (Green Alliance), and Sir Graham Wynne (former chief executive of the Royal Society for the Protection of Birds). Paul Dickinson (CDP), Stephen Joseph (Campaign for Better Transport), Jeanette Longfield (Sustain), and Keith Tyrell (Pesticide Action Network) kindly tested the draft survey tool and made helpful comments.

The views expressed in this report are those of the authors and should not be interpreted as official positions of any of the funding organisations, the Environmental Funders Network, or The Ecology Trust.

1 David Clifford et al., *Mapping the environmental third sector in England.* London: Third Sector Research Centre, Working Paper 98, May 2013.

THE ENVIRONMENTAL FUNDERS NETWORK (EFN)

EFN is collaborating to secure a truly sustainable and just world, fit for people and nature. Our mission is to increase financial support for environmental causes and to help environmental philanthropy to be as effective as it can be. Our members are funders, mainly based in the United Kingdom, who pursue these aims at home and overseas. As their network we will work inclusively, efficiently, transparently, accountably and to high standards of social and environmental responsibility.

EFN does not hold funds, consider or make grants, or advise fundraisers. PLEASE DO NOT SEND FUNDING REQUESTS TO EFN AS WE CANNOT RESPOND TO THEM.

Funders interested in joining EFN or finding out more about the network should contact the EFN coordinator, using the contact form at www.greenfunders.org.

Other recent EFN publications include:
Where the Green Grants Went 5: patterns of UK funding for environmental and conservation work.

This report, along with other EFN publications and resources relevant to environmental philanthropy, are available on the Resources page of our website: www.greenfunders.org/resources.

Contents

Foreword

This excellent report comes at an important moment for the UK's non-profit conservation and environment groups.

Following a long period of growth and rising influence, recent years have seen a period of challenges. The impact of recession, structural changes in the funding environment, politics being trapped even more in the short-term, environmental skepticism and a stalling of international progress on sustainability are among some of the headlines.

At the same time numerous specialist reports signal the continuing strength of negative trends, on biodiversity, climate change and the state of different resources, and in so doing confirm the vital on-going importance of a successful environmental sector. Against this backdrop the question of how best to build strength in a movement that will be fit for purpose in the years ahead could not be more timely.

This report reminds us that finding space for innovative strategic thinking is a vital part of the answer. So is the need to set out and communicate a more positive vision, one that can capture the imagination of voters and consumers. Finding a new suite of tactical tools while delivering a more joined-up strategy between groups will require new spaces to be opened, to permit different kinds of conversations. This in turn raises big questions for the funding community, not least in how they can most effectively assist organisations in temporarily liberating themselves from the tyranny of the in-tray and onto spending more time thinking through the bigger picture.

The creation of new spaces to consider the wider strategic situation seems to me to be more important than ever, and a vital investment in ensuring future success. It might include a review of big questions such as how best to influence the financial sector, ways to achieve greater funding security, how to deal with demographic change, what strategies might be best for working with businesses, ways to build stronger cooperation between environmental groups and how to engage with politics. While none of this is straightforward, there are undoubtedly opportunities to be seized.

The British environment and conservation groups have a proud track record of success, and they can point to very substantial changes achieved with tiny resources. But times have changed, and so must we. In the pages that follow is excellent food for thought that I hope will lead to a vigorous discussion that inspires a new wave of progress toward the sustainable society we know it is possible to build. All the tools are available to do it, what is needed is a broad understanding of how best to use them in the new and evolving situation we find ourselves in.

Tony Juniper, Cambridge, October 2013

Executive summary

This report is based on the responses to a survey of chief executives of UK non-profit environmental organisations.

- The 139 environmental organisations providing income data had a combined income in their latest financial years (usually 2011/12) of close to £984.9 million, and 11,125 FTE employees working on environmental issues. The median income for the 139 organisations was £1.5 million, and the median number of staff was 17.

- Between them the 139 organisations had just over 4.5 million members and supporters, which means that nearly one in ten adults in the UK is a member of an environmental group.[2] Membership is heavily concentrated in a small number of organisations, with just 12 from the group of 139 accounting for more than 80% of the members.

- Between 1995 and 2008 real income for environmental organisations in England increased more than fivefold. Analysis of the incomes of 107 of the organisations taking part in the survey shows that real income continued to rise from 2007/8 through to 2010/11, before suffering a 5.2% drop during the 2011/12 financial year.

- Despite this fall in income the expenditure of the 139 organisations was £46.4 million less than their income during their most recent financial years. This means that 4.7% of the income received was being retained.

- The single largest category of income for the 139 organisations was funding from central government departments and/or the European Union, which accounted for 20% of overall income. Cutbacks in this expenditure are causing concern across the sector.

- Contributions from individuals, in the form of donations, membership fees, or sales to members of the public, accounted for 34.8% of the income of the 139 organisations, while grants and donations from trusts, foundation or charities contributed a further 10%.

- The last three years have seen a shift from grant income to contract income, particularly with respect to government sources. The sector as a whole appears to be increasingly dependent on income from the business community.

- More than 40% of the expenditure of the 139 organisations supports work at the local or regional level within the UK, with work at the national level accounting for less than a third of total expenditure. Less than 3% was being directed at work at the EU level, where it is estimated that at least 80% of the environmental legislation that affects the UK is framed.[3] Global institutions received less than 1% of total expenditure.

- In terms of thematic focus, work relating to the natural environment is dominant, with 44.9% of expenditure supporting work on *biodiversity and species preservation* or *terrestrial ecosystems and land use*. Work on *climate and atmosphere* accounted for just 7.3% of expenditure. When *energy* and *transport* are added to this the total still amounts to less than 15% of overall expenditure for the 139 organisations.

- Groups responding to the survey prioritised the need for more work on *energy, fresh water, sustainable communities* and *trade and finance* (particularly finance) in the next three years, if resources are available.

- The sector uses a core ‘play-book’ of approaches, comprising *awareness-raising* and *environmental education, civil society coordination*, and *advocacy* informed by research. Indeed *advocacy* was the most widely used approach, with 109 of the organisations doing some advocacy work. Throughout the survey respondents set a lot of store on ‘expertise’ and ‘evidence-based research’. Chief executives in the sector think additional investment is needed within this existing set of approaches, with *advocacy* topping the rankings in terms of where more investment is needed.

- The most important skill-sets for the sector to acquire were seen as *economics and/or financial expertise*, followed by *leadership and organisational planning, political lobbying expertise* and then expertise in *public opinion polling, strategic communications and framing*.

- Greenpeace UK was seen by its peers as the UK environmental organisation achieving the most

2 Some individuals will be members of more than one of the organisations responding to the survey. At the same time a few of the large organisations that did not take part in the survey have large numbers of individual members. Had they taken part then the 4.5 million number would have been higher.

3 European Environmental Bureau, *EU Environmental Policy Handbook: A Critical Analysis of EU Environmental Legislation*. Brussels, 2005.

relative to its resources, with Friends of the Earth (England, Wales & Northern Ireland – EWNI) and the Royal Society for the Protection of Birds (RSPB) tied in second place, and WWF UK in fourth. The most important attributes of effective environmental organisations included a clear mission and vision plus strong leadership, expertise, effective policy work, a large membership base and the ability to engage the public, as well as a willingness to collaborate with other organisations and to be creative in response to changing circumstances.

- Respondents to the survey saw the sector's greatest strengths as being the people who work within it, with both staff and volunteers seen as passionate and committed. There is perceived to be wide public sympathy for the aims of the sector, and a high degree of public trust. Expertise and a commitment to evidence-based work were again seen as strengths, and the sector sees itself as being creative and innovative, and often quite good at collaborating. The diversity of the sector in terms of different types of groups with different approaches and tactics is also seen as a core strength.

- The economic crisis and resulting austerity policies are seen by respondents as a double-edged sword, providing an opportunity for alternative visions in relation to well-being, economic growth and consumption, but at the same time leading to public apathy and political preoccupation with economic growth at any cost.

- The development of social media technologies was seen as an important opportunity for the sector, as was the potential for increased work at the community level. The need for more effective collaboration within the sector was highlighted, as was the need for environmental organisations to work more effectively with non-environmental groups within civil society. However, the scope for more collaboration was seen as being threatened by the increasing competition for resources within the sector.

- In addition to funding cutbacks, other challenges faced by the sector included demographic shifts within the UK population, the political difficulties associated with tackling climate change (particularly at the international level), and the shift of political and economic power towards economies such as China, India and Brazil.

- Concern about the political context in the UK also came across very clearly, with respondents highlighting the following: claims that greening the economy would impede growth; the short-termism of the political system; the political influence of fossil fuel companies; and the growth of climate scepticism.

- Turning to internal challenges and weaknesses of the sector, the lack of resources for skills development was highlighted, along with a lack of time for reflection and strategic planning, plus low salaries which make it hard to attract staff with the skills that are needed.

- A reluctance to move away from tried and tested approaches was also identified, along with an emphasis on tactics over strategy, and a lack of 'systems thinking' and 'horizon-scanning' within the sector. There was also a perception that the sector is not good at transferring expertise and knowledge internally.

Five central themes emerge in the responses to the survey, and these are threaded through the 'What are the implications?' paragraphs that end each section, and then returned to in the Conclusions section. The five themes are:

a changes to the FUNDING available to the sector, and the role played by funders;

b questions relating to the allocation of RESOURCES;

c SKILL-SETS and tools that are needed in order to increase effectiveness;

d the barriers to INNOVATION in response to challenges and needs that are identified; and

e the potential for increased COLLABORATION.

Introduction

This report is intended to build on the analysis of environmental philanthropy carried out for the Environmental Funders Network in the five editions of *Where the Green Grants Went*.[4] The five reports look in detail at the supply side of the environmental grants market, while this report focuses more on the demand side, on the priorities and needs of UK non-profit environmental organisations. As such it is intended to complement the work of the Third Sector Research Centre, whose recent working paper *Mapping the environmental third sector in England*[5] provides an overview based on Charity Commission data and the National Survey of Third Sector Organisations. Similar research has been undertaken in the United States[6,7], and Israel[8], and is underway in Australia.[9] Research of this kind is intended to help both funders and grantee organisations to get an overview of the field in which they are active, in the hope that funding can be better tailored to needs in the future.

This report represents EFN's first attempt to survey the leaders of environmental non-profit groups in the UK. As with *Where the Green Grants Went*, there is an element of 'learning by doing' involved in such research, and we hope that future reports of this kind will provide increasingly useful insights. Feedback and suggestions as to how this research could be improved would be much appreciated. Please email us at: pulse@greenfunders.org.

4 These are available at www.greenfunders.org along with other resources.

5 David Clifford et al., *op. cit.*

6 Baird Straughan and Tom Pollak, *The Broader Movement: Nonprofit Environmental and Conservation Organizations, 1989 – 2005*. Washington D.C.: The Urban Institute, 2008.

7 Baird Straughan and Tom Pollak, *The Broader U.S. Environmental Movement: Composition and Funding Insights*. New York: Environmental Grantmakers Association, 2011.

8 Alon Tal et al., *Israel's Environmental Movement: Trends, Needs and Potential*. Beer-Sheva: Ben Gurion University of the Negev, 2011.

9 Australian Environmental Grantmakers Network, forthcoming.

Methodology

This report is based on responses to a survey designed by EFN, with the help of an advisory group of experienced environmentalists. We sent the survey to the chief executives of 300 UK non-profit environmental organisations in January 2013, and most responses were collected during February–April 2013. The 300 comprised the 150 largest UK environmental organisations measured by income[10] plus a further 150 that we selected based on past research, with a view to getting a balanced sample of the overall sector. The survey questions can be found in Appendix A. A list of all the organisations responding to the survey is provided in Appendix B.

The organisations responding to the survey represent a good cross-section of the environmental non-profit sector in the UK, with many household names included, along with smaller and more specialist groups. They also range from mainstream to more radical in terms of values and goals.

The fact that many of the largest organisations within the sector took part in the survey gives us a reasonable amount of confidence that the quantitative data presented in the first half of the report is robust, and provides a reasonable indication of how resources are currently being allocated. There is, however, room for improvement in future surveys of this kind, and the findings presented in Part A are less comprehensive than those elsewhere in the report.[11] The responses from environmental organisations have been complemented by the perspectives of 37 foundations and trusts that are members of EFN, also collected in spring 2013.

Throughout the report we refer to the environmental groups that responded as civil society organisations (CSOs), and the philanthropic organisations as foundations.

10 No definitive list exists of the largest UK environmental organisations. The authors drew on data kindly shared by the Third Sector Research Centre team, and then augmented this using their own knowledge of the sector, adding organisations not included in the TSRC dataset to arrive at a working list of the '150 largest organisations by income'. The goal is to refine this list in future research.

11 Organisations that would like to be included in future editions of this research are asked to email pulse@greenfunders.org.

PART A: Income for the environmental sector

1 Income, Staffing And Membership

12 David Clifford et al., op. cit., p. 13.

13 For organisations that work on other issues besides the environment, e.g. international development groups, the income figure used is the budget for their environmental work only, rather than total organisational income.

14 'Why is BP important to the UK economy?', BBC News, 10th June 2010.

15 Some individuals will be members of more than one of the organisations responding to the survey. At the same time a few of the large organisations that did not take part in the survey have large numbers of individual members. Had they taken part then the 4.5 million number would have been higher.

16 'British politics at the crossroads: Tory membership plummets over disenchantment with Westminster', The Independent, 9th August 2013; 'Membership of Tories halves under Cameron leadership', Evening Standard, 18th September 2013.

17 Baird Straughan and Tom Pollak, 2011, op.cit.

The survey aggregates annual income data from 139 environmental CSOs, whose combined income for environmental work (in their latest financial year, usually 2011/12) amounted to £984.9 million. By comparison, the Third Sector Research Centre (TSRC) report estimated income for 1,700 primarily environmental charities based in England to have been £1.3 billion in 2008, or 2.6% of total charitable income.[12]

The income of the CSOs ranged from more than £120 million down to £0.[13] As is often the case within civil society, the bulk of the income was concentrated in a relatively small number of organisations, the 14 with the highest income accounting for more than 75% of the total of all those taking part. The mean income across the 139 CSOs was £7,085,741, but the median income, at £1,520,205, gives a better sense of a typical organisation responding to the survey. Fifty-six of the CSOs had income of under £1 million and a further 25 had incomes of between £1 million and £2 million.

The 139 organisations had a total of 11,125 FTE employees working on environmental issues. To put this in context, BP employed 10,105 staff in the UK in 2010.[14] As with income, employees are heavily concentrated, with the largest 17 CSOs accounting for more than 75% of total FTE positions. The median number of staff was 17.

Between them the 139 CSOs had just over 4.5 million members and supporters, which means that nearly one in ten adults in the UK is a member of an environmental group.[15] This represents a huge resource, and the ability of CSOs to mobilise their membership base effectively was seen as one of the attributes of the most successful organisations (see page 32 for more information). By comparison, the Conservative Party and Labour Party are each thought to have between 100,000 and 200,000 members.[16]

Membership is even more heavily concentrated in a small number of CSOs than income or staff, with just 12 organisations from the group of 139 accounting for more than 80% of the 4.5 million members. Only ten of the CSOs had more than 100,000 members, and the median number of members for all the respondents was just 740.

WHAT ARE THE IMPLICATIONS?

The 'ecosystem' of UK environmental CSOs comprises a small group of organisations with relatively high incomes and staff numbers, some of which also have a large membership base, and then a large number of smaller organisations. Issue expertise and skills are also unevenly distributed across the sector. What tools and resources would be most useful in terms of promoting more conscious and routine COLLABORATION across the sector?

2 A shortage of income?

Funding is a critical concern for chief executives of CSOs, and cutbacks in funding cropped up repeatedly as an issue in the text responses to the survey, topping the list of responses to questions about the challenges faced by the sector.

The response below was typical:

"Funding – sorry, there are already many casualties and projects struggling on the edge. We are all going to have to be very clear about our aims to ensure: a) that these continue to be delivered; and b) that we don't get forced into unwanted change in order to follow the funding."

Given the concern being expressed about finances by many chief executives responding to the survey we felt it was important to look back at income levels for the sector over a number of years, in order to put 2013 into a wider context. In other words, were the many responses to the survey that focused on funding something that one would expect to find all the time, or is there evidence that the sector is facing particularly straightened circumstances?

Data gathered for the recent TSRC Centre report on the environmental sector in England shows that aggregate income for environmental organisations rose steadily from 1995 to 2008, even when inflation is taken into account, as shown in Chart 1.

Between 1995 and 2008 real income across the sector increased more than fivefold, suggesting significant growth in capacity. In the United States a similar story seems to apply, with real income more than tripling over the period 1989 to 2008.[17] There were plenty of responses suggesting that the sector might need to think about consolidation, for example:

"[There is] a need for a very heavily populated and fragile sector to consolidate, merge and achieve the scale necessary to drive public opinion and force change when working with large business interests and increasingly international institutions."

"The sector is overcrowded with many NGOs driven by funding/funders agendas or relatively specialist (insignificant?) issues. As a sector we lack any real strategy nor have we considered building partnership models that could achieve real gains for the environment."

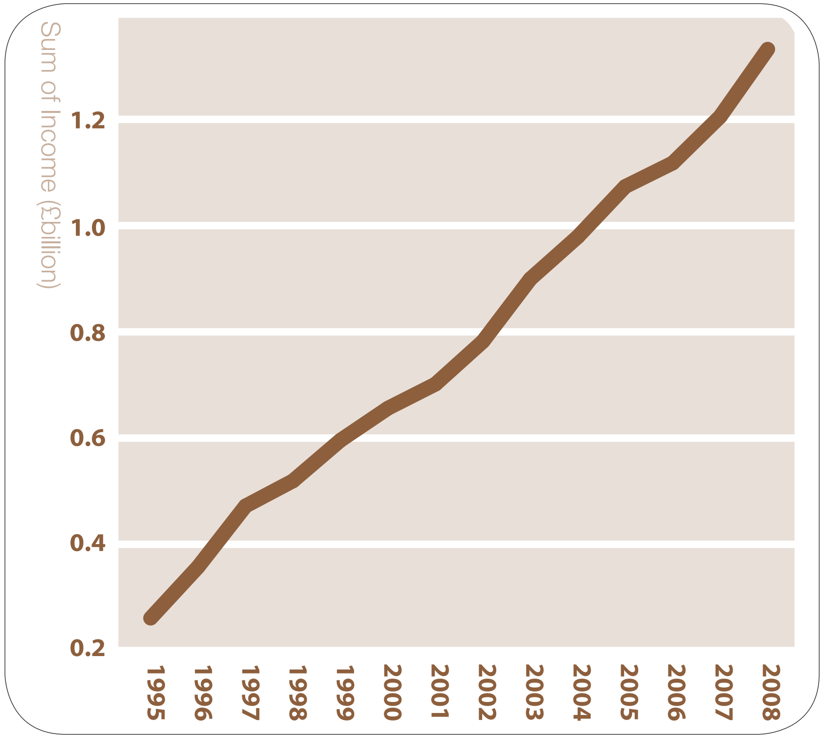

Chart 1
Growth of aggregate income of English environmental organisations, in 2008 prices

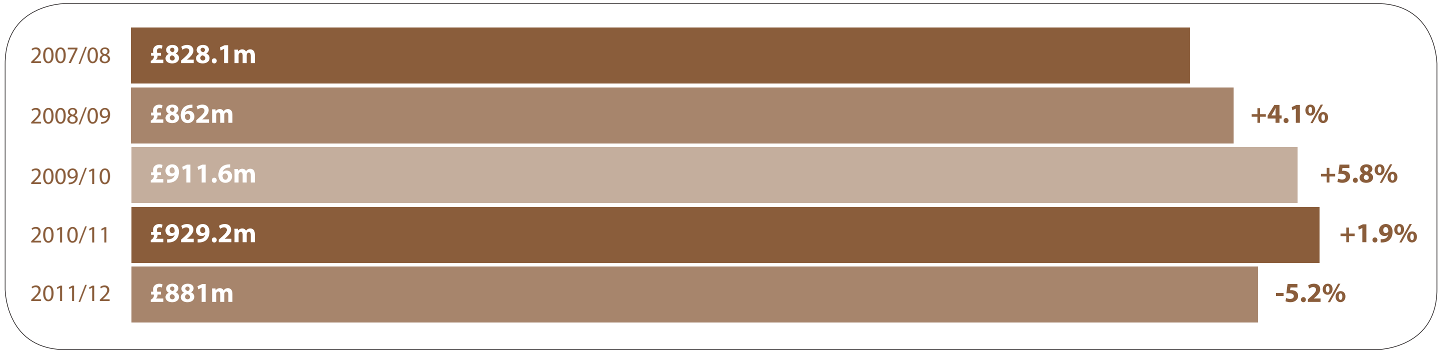

Chart 2 **Income of the 107 organisations in 2012 prices**

In order to explore developments since 2008, and in particular the impact of the recession, we analysed the last five years of income data for the CSOs responding to the survey. Data was available for 107 organisations for all five years. When it is adjusted for inflation it provides some interesting insights:

a The variability of income from one year to the next is very clear. Just seven out of the 107 organisations managed to increase their income from year to year in all five of the years from 2007/8 to 2011/12. The other 100 organisations experienced at least one year where their real income fell relative to the previous year.

b More than two-fifths of the organisations had lower real incomes in 2011/12 than five years earlier, in 2007/08.

c Fifty-nine of the 107 organisations had lower real incomes in 2011/12 than in the previous financial year, the only year out of the five in which a majority of the 107 organisations experienced a drop in income.

d The combined real income (adjusted for inflation) of the 107 organisations dropped by 5.2% from 2010/11 to 2011/12, having climbed in each of the previous four years, as shown above.

These figures suggest that there was a decline in funding for the sector in 2011/12, particularly relative to the preceding years, where year-on-year growth in real income was being experienced by the 107 organisations. Significant though the 5.2% fall is, it is considerably smaller than the kind of cuts being made in government spending across the UK.

The combined expenditure of the 139 CSOs responding to the survey amounted to £938.5 million, or £46.4 million less than their combined income during the same financial period. This means that 4.7% of the income received was being retained.

WHAT ARE THE IMPLICATIONS?

The insecurity of FUNDING for the sector comes across clearly from this section, and the recent decline in real terms income has thrown this into stark relief, especially after a period of steady income growth. Is it the case that there are now too many similar organisations within the sector, chasing after a declining pool of income? If so, then how could the sector best consolidate its resources, and what role could funders play?

3 Sources of income for non-profit environmental groups

We asked respondents to break their income down in detail, using 15 categories. Chart 3 shows the results.

The importance of funding from central government departments and the European Union stands out, accounting for more than 20% of overall income, and with 86 of the 137 CSOs having received at least some funding from this source. Given the significant cuts in expenditure being implemented by the coalition government, organisations with a strong reliance on government funding are particularly vulnerable.

One respondent summarised the situation as follows:

"Loss of public sector funding across the board. • Tight procurement rules requiring public sector to run expensive and time consuming tenders before supporting projects, even where these have been initiated by non-profits, and development time carried out at our risk. • Aggressive competition for local work from national and regional organisations that were previously fully funded by government."

The next three categories of income in Chart 3 all represent contributions from individuals, either in the form of donations, membership fees and dues, or sales to members of the public (the latter mainly comprising entrance fees at zoos, nature reserves and the like). Together these three categories accounted for 34.8% of the income of the CSOs.

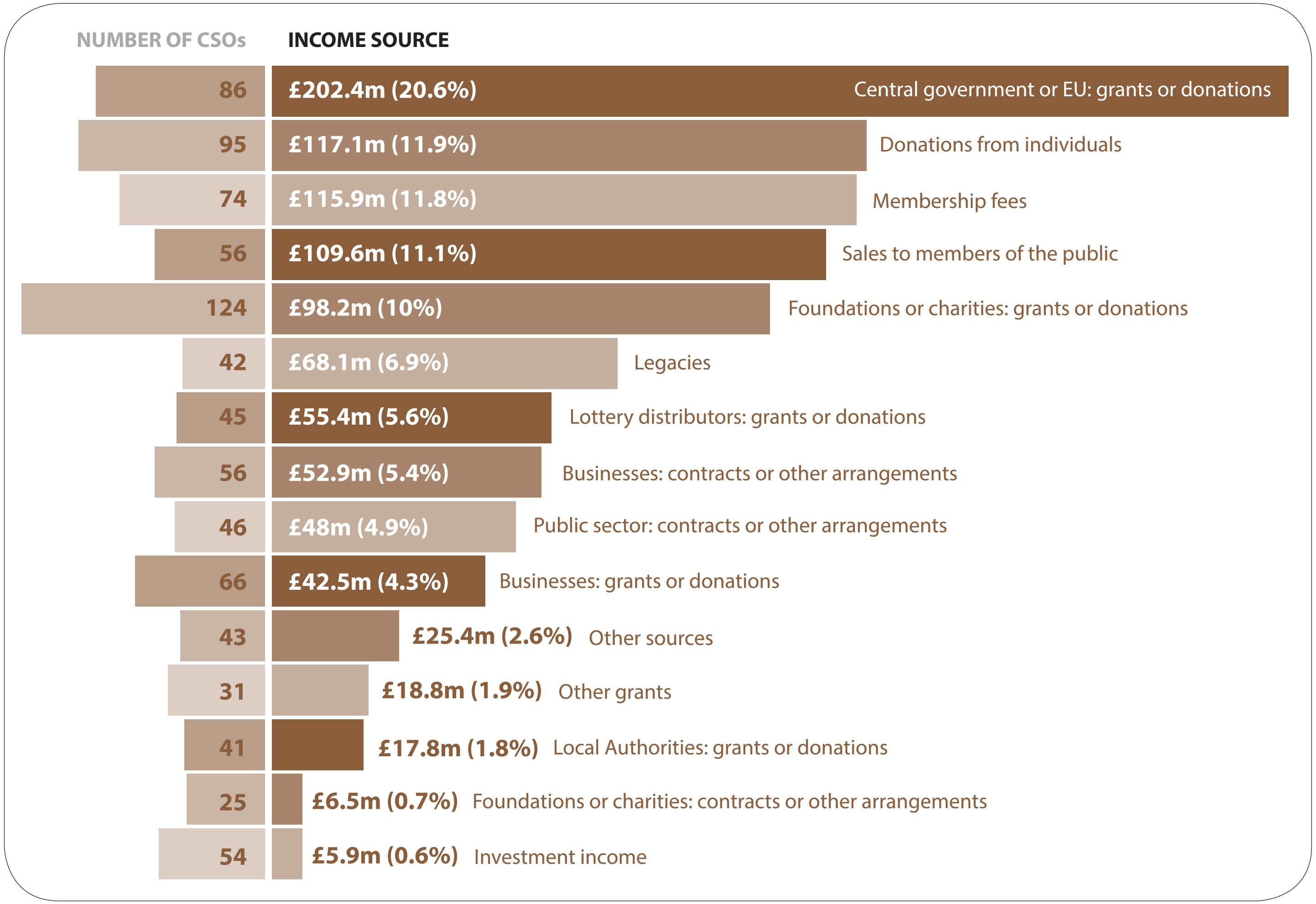

Chart 3 **Income sources for 137 UK environmental organisations**

Grants and donations from trusts, foundations or charities accounted for 10% of total income, and 124 out of the 137 CSOs responding to this question had received at least one grant of this kind in the past financial year. Foundations clearly support a wide range of activities within the sector. The £98.2 million in grants from foundations is higher than the estimate of £75.5 million featured in *Where the Green Grants Went 5*.[18]

Another notable aspect is the number of groups responding to the survey that were highly dependent on such income. Some 75 of the 137 organisations responding to this part of the survey received 50% or more of their funding from just one of the 15 categories above. Of these, 33 were receiving 50% or more, and 16 were receiving 75% or more of their income in the form of foundation grants. Dependence on philanthropic grants was much higher than on any other form of income. Many of the CSOs responding to the survey had a limited number of income sources, with nearly half of the CSOs having five or fewer different forms of income.

18 Jon Cracknell, Nick Perks, Heather Godwin & Harriet Williams, *Where the Green Grants Went 5*. London: Environmental Funders Network, 2012. This can be explained in part by the fact that some of the foundation grants being received by UK-based organisations are coming from foundations outside the UK, which fall outside the scope of *Where the Green Grants Went*. Other explanations for the discrepancy include i) inflation (most of the environment organisation data is for 2011/12 whereas the trust data is for 2009/10); ii) possible growth in environmental philanthropy over the last two years; and iii) the fact that there may be additional UK trusts and foundations that should be included in future editions of *Where the Green Grants Went*.

WHAT ARE THE IMPLICATIONS?

The dependence of many CSOs in the sector on a narrow FUNDING base comes across clearly. The importance of philanthropic FUNDING is also clear, particularly for start-up organisations and those engaged in advocacy and policy work. Are there opportunities for philanthropic and non-philanthropic funders of the sector to COLLABORATE to try to provide more security of funding, whilst still playing to their respective strengths?

4 How have income sources changed?

We asked chief executives how the income sources for their organisation had changed over the last three years. Of the 128 CSOs that responded to this question 25 had seen no significant change. Across the sector as a whole, however, there appear to have been some important changes, as shown in Chart 4.

The chart shows whether each of the categories of income set out in Section 3 above has become more or less important overall for the organisations responding to this question. The scores were calculated by analysing the responses from each of the 128 CSOs to see whether they were getting more or less funding from a particular source, and then aggregating the numbers to create Chart 4. The numbers in the black circles in the chart show the net change in the importance of each income source, with positive numbers showing that source of income has become more important to the sector, and negative numbers showing it has become relatively less important.

It is clear that the sector has become more dependent on income from businesses in the last three years, either in the form of contracts (for consultancy and the like) or via grants and donations. One respondent summarised the situation like this:

"As traditional funding sources dry up – not so much foundation or donor money – environmental groups are turning to companies for their funding. That's GREAT if they then force a change in

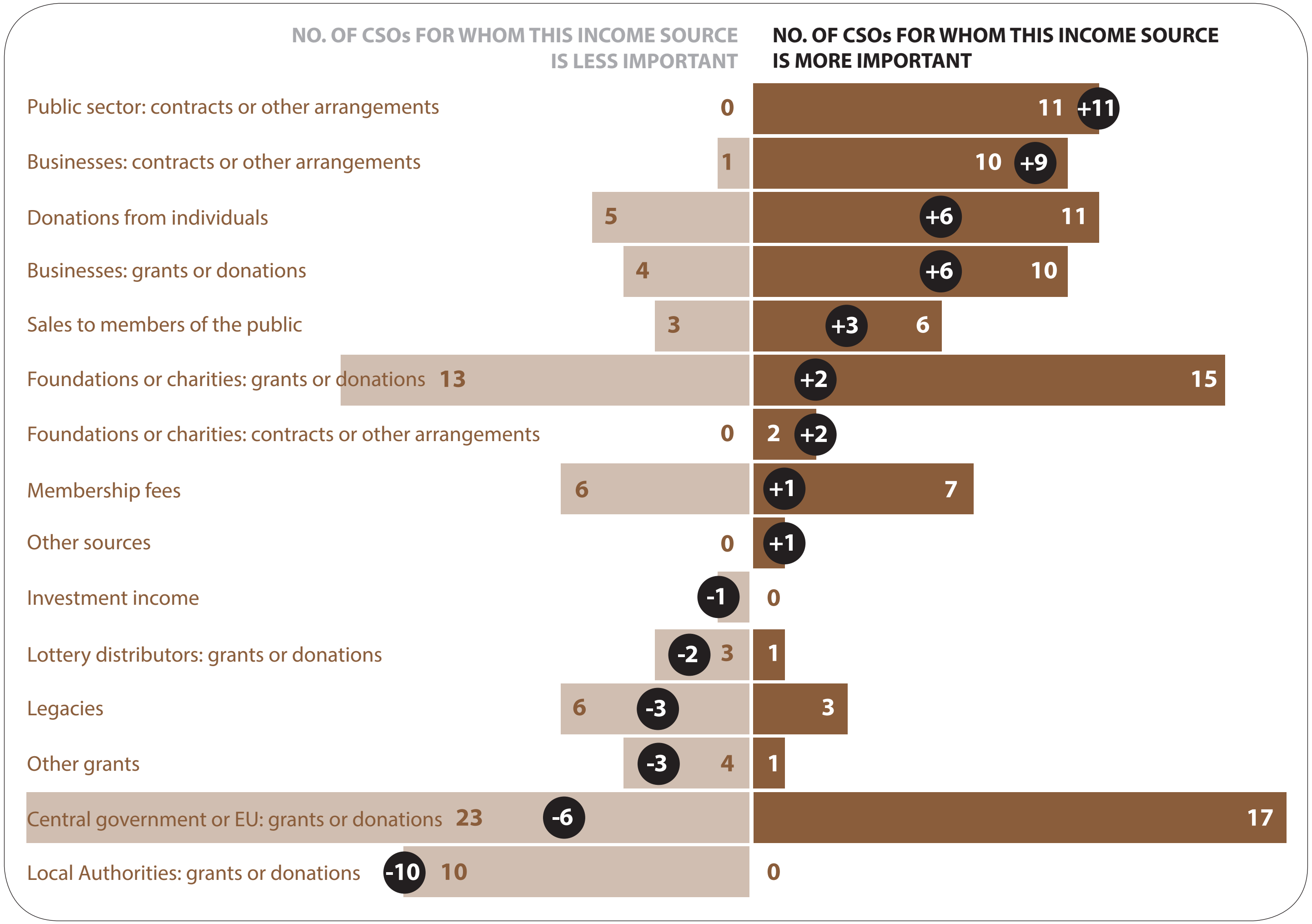

Chart 4 Changes to income sources for 128 UK environmental organisations

behaviour on the companies but disastrous if the companies give money and change nothing. It's a challenge of values - compromising your values to stay alive. In that situation, such groups would be better to disappear because them compromising to get funding, compromises the integrity of the whole sector."

As suggested in the quote, funding from central government departments and the European Union has been falling in importance, and from local authorities even more so.

With central government and EU funding, 17 organisations reported that this had become more important for them, as against 23 who had been losing funding from this source (giving a net score of -6). For local authority funding the picture is more clear-cut, with not one group seeing this as having increased in importance (net score of -10). Interestingly, a number of organisations referred to international sources of funding becoming more important for their work, usually governments or international bodies, with the sense that they are having to look overseas to replace income they used to be able to secure in the UK.

In addition to turning to businesses for financial support, environmental CSOs are increasingly having to compete for contracts to deliver programmes:

"I don't think people are unaware of any of the problems that I see ahead: lack of public funding for anything non-statutory or discretionary; more non-citizen-led charities competing for funds – e.g. from local authorities; independence of sector compromised by 'service-delivery' aspects that are not well negotiated; the need to be always innovative for funders; decrease in capacity within the sector in Scotland as funding is squeezed at UK level for some organisations; fragmentation of sector as local groups spring up to look after assets."

Other specific concerns relating to funding were the potential impacts of reforms to the Common Agricultural Policy for environmental organisations involved in land management, and a widely shared concern that demographic shifts in UK society would make it harder for environmental groups to raise funds in the future, as younger generations may be less willing to give to environmental causes.

WHAT ARE THE IMPLICATIONS?

Increasing competition for FUNDING is a recurring theme in responses to the survey, with chief executives seeing it as one of the principle barriers to increasing COLLABORATION across the sector. The shift towards contracts appears to be increasing insecurity and 'churn', the reverse of what is needed if CSOs are to have the confidence to INNOVATE. At the same time increased reliance on FUNDING from the business community could potentially threaten the independence and integrity of the sector. How should the sector respond to this combination of pressures?

Funding from corporations whose activities cause significant environmental impacts

The question of whether or not environmental CSOs should accept funding from corporations that cause significant environmental impacts is one that divides opinion within the sector. With this in mind, respondents were asked to what extent they agreed with the following statement: 'It is acceptable for environmental groups to take money from corporations whose activities cause significant environmental impacts (e.g. mining companies, fossil fuel companies, airlines etc).' Chart 5 shows the distribution of responses from 136 CSOs.

A total of 26 organisations selected 0, indicating that they strongly disagreed with environmental groups accepting funding from companies with significant environmental impacts. With 19.1% of the votes cast, this response was the one with the most support. Beyond this group of 26 organisations opinion was more evenly spread, as shown in the chart. The majority of respondents disagreed with the proposition, the scores 0 to 4 accounting for 50.7% of votes, and scores 6 to 10 for 34.6%, but the text responses reveal a nuanced perspective. The need for environmental organisations to retain their independence and credibility comes across very strongly, along with concern that funding of this kind will simply generate greenwash. On the other hand respondents accepted that there might be circumstances in which it would be appropriate to accept funding of this type, particularly if the company in question was improving its practices as a result of the relationship. One respondent commented: "We can't only work with the 'good guys'."

The two quotes below reflect the diversity of perspectives:

"As a matter of principle [our organisation] does not accept funding from companies that affect, or would appear to affect, our independence. We have direct experience of environmental organisations taking money from corporations and censoring themselves because of this funding. This is unacceptable."

And on the other hand:

"Very little corporate or even charitable funding can be shown to be entirely 'ethically' derived. The choice to accept corporate money should be made on an individual case-by-case basis, balancing the impacts it might have on the reputation of the charity and its ability to deliver its work with the potential positive benefits that could be achieved from the specific projects funded. Whilst sometime unpalatable to many working for environmental groups, there is no simple or sweeping answer to this question."

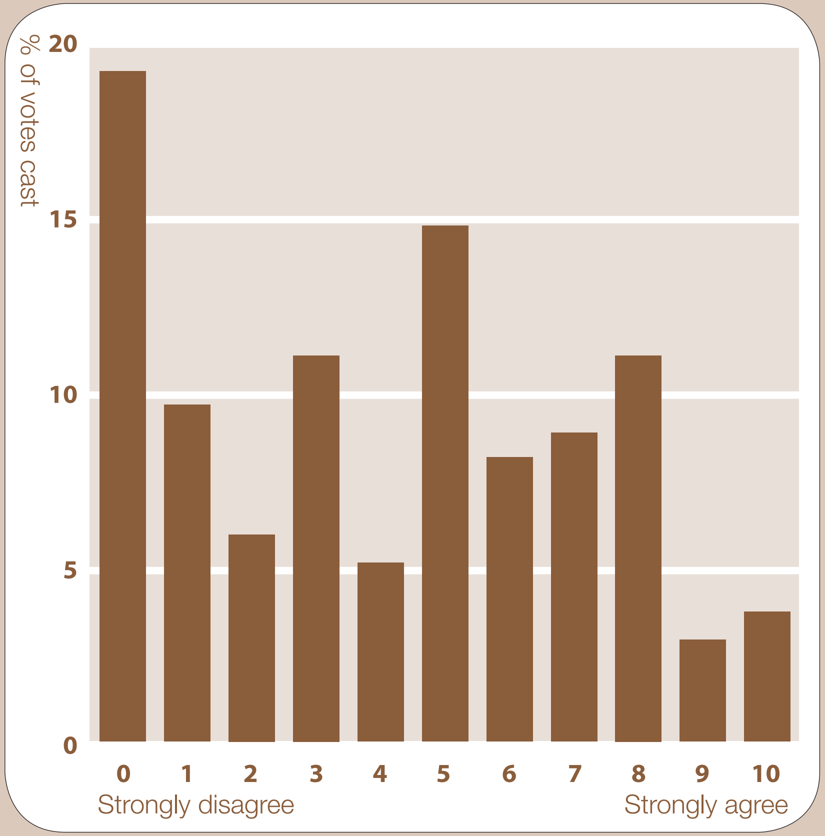

Chart 5
Funding from corporations whose activities cause significant environmental impacts

5 The advantages of philanthropic capital

In the context of declining income for the sector, the way in which philanthropic capital is deployed arguably becomes more important than ever. We asked chief executives what they thought the advantages of philanthropic funding were, relative to other forms of income.

A total of 132 CSOs responded to this question and there was strong alignment in the responses, with the key advantages of philanthropic capital being seen as:

- It is often UNRESTRICTED, giving flexibility to organisations to meet core costs, build capacity, and invest in developing new ideas;
- RELATIONSHIPS WITH FOUNDATIONS are strongly valued by grantees – in addition to money, foundations often provide valuable advice, support and contacts. Respondents felt that there was often a strong alignment in terms of values between foundations and their organisation, and that this meant the relationship was more trusting, whereas with other forms of grants it was a more prescriptive and transactional relationship;
- INDEPENDENCE – funding from foundations rarely comes with strings attached, and doesn't constrain the organisation in terms of its ability to criticise either governments or corporations. Foundation funding is of particular importance for organisations engaged in POLICY ADVOCACY. There was a strong sense in the responses that corporate funding, by contrast, hampered independence, a concern expressed on the previous page;
- LESS BUREAUCRACY – many respondents see foundation funding as less bureaucratic, both in terms of securing grants, and especially in terms of reporting. This means that more time is available for core work;
- INNOVATION – grants from foundations are crucial for supporting pilot projects and experimentation, particularly for organisations with a limited track record. As one respondent commented:

"It can enable ideas and approaches that no one else will support because at its best it is prepared to facilitate experimentation and considered risk taking."

- RESPONSIVENESS – respondents felt foundations were quicker to react to changing events, and would support work on emerging issues;
- CONTINUITY – the willingness of some foundations to provide multi-year support was highly valued;
- AMBITION FOR CHANGE – finally, respondents felt that foundation funding enabled more ambitious projects:

"Philanthropic funding provides more freedom to … take the radical approaches that are required to effect real change. It is more likely to fund projects that 'push boundaries' which is often hard to get funding for in other places."

The key advantages of philanthropic funding are captured in the word cloud opposite.

WHAT ARE THE IMPLICATIONS?

Philanthropic FUNDING has particular advantages relative to other types of income for non-profit environmental organisations. Are philanthropists really making the most of these advantages when determining their grant-making strategies? It is clear that philanthropic funding is currently spread thin and wide across the sector. Could foundations provide better support to the sector by targeting grants towards the 'places that other grants can't reach'? What approaches to COLLABORATION by foundations have the most potential?

Chart 6 Key advantages of philanthropic funding

PART B: Current resource allocation and future needs

6 Where are organisations carrying out their work?

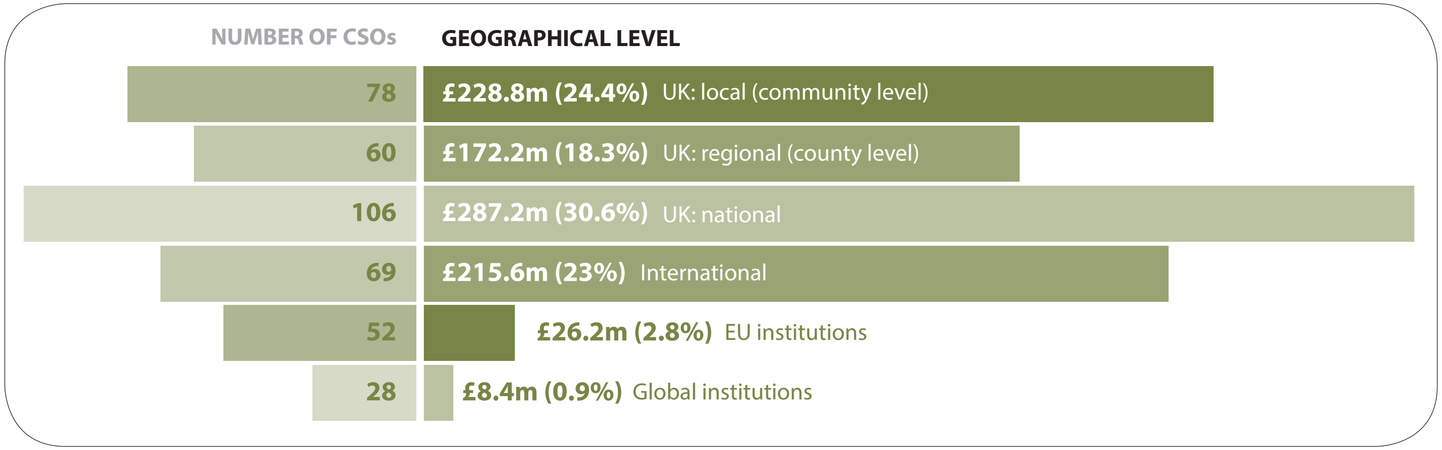

Chart 7 **Expenditure of 139 UK environmental CSOs broken down geographically**

19 European Environmental Bureau, *op. cit.*

20 Jon Cracknell et al., *op. cit.* Data is for the 2009/10 financial year.

21 Readers are encouraged to treat the figures in this part of the report as provisional for the reasons mentioned in the Methodology section. It is hoped that additional CSOs will take part in future surveys such that these numbers can be 'firmed up'.

22 The *biodiversity and species preservation* category includes work protecting specific species and their habitats, whereas work in the *terrestrial ecosystems and land use* category tends to take place at a larger scale, and encompasses the purchase of land, plus work on forests. For more details please see Appendix C.

We asked chief executives to break down their expenditure into six different geographical categories: a) locally (within the UK); b) regionally (within the UK); c) nationally; d) European Union institutions/level; e) internationally; and f) global institutions (UN, OECD etc). The results are shown in Chart 7.

As noted in Section 2 the combined expenditure on environmental issues by the 139 CSOs amounted to £938.5 million, or £46.4 million less than their combined income during the same financial period.

More than 40% of the expenditure of the 139 CSOs is at a sub-national level in the UK, either local or regional. Unsurprisingly, more CSOs (106 in all) work at the national level than at any other geographic level, however national work accounts for less than a third of total expenditure. This is interesting given the concerns expressed below about the government's approach to environmental issues.

Even more notable is the fact that less than 3% of the organisational expenditure was being directed at work at the EU level, where it is estimated that at least 80% of the environmental legislation affecting the UK is framed.[19] A total of 52 out of the 139 CSOs were doing some work at the EU level, but for four out of five of these groups the EU accounted for less than a quarter of their expenditure, and for 24 of them it was less than 5% of their work. Few groups have a strong focus on EU-level work.

Global institutions also received a small share of expenditure, less than 1% of the total, despite their potentially vital role in tackling systemic environmental issues like climate change, population growth, water scarcity, and land-grabbing, all topics that were flagged up as challenges by respondents.

In total 26.7% of expenditure from the 139 CSOs was being directed to work outside the UK. This figure is considerably lower than the 48.5% of grants from foundations that support international work, as reported in the most recent edition of *Where the Green Grants Went*.[20]

WHAT ARE THE IMPLICATIONS?

Should UK environmental CSOs direct more of their RESOURCES towards work at the national level in order to try to shore up government interest in the environmental agenda? Are they missing out on opportunities to influence EU policy and thereby global agendas? How can the more systemic environmental challenges identified as important by respondents be tackled without engagement at the global level? Given that the UK environmental sector is relatively sophisticated and well resourced, should UK groups be looking to increase their COLLABORATION with, and support for, their counterparts overseas?

7 Which issues are priorities for UK environmental organisations?

In addition to breaking down their expenditure on a geographical basis we asked chief executives to estimate how their expenditure broke down across 12 broad thematic issue categories. Detail on the categories is provided in Appendix C, and the thematic breakdown is shown in Chart 8.[21]

In terms of total expenditure, work relating to the natural environment is dominant, with 44.9% of expenditure falling into the categories of *biodiversity and species preservation* (30.3%) or *terrestrial ecosystems and land use* (14.6%). The *biodiversity and species preservation* category is also the one in which the largest number of organisations are working, with 81 of the 139 CSOs doing at least some work on this set of issues.[22] These two categories are followed by *sustainable communities* (14.4%), *agriculture and food* (9.1%) and *coastal and marine ecosystems* (7.4%).

Climate and atmosphere accounts for just 7.3% of expenditure from the 139 CSOs, even though there were nearly as many organisations (78 as against 81) working on this issue as on *biodiversity and species preservation*. The claim is sometimes made that climate change has taken over the environmental agenda, but this doesn't appear to be the case in terms of the way in which resources are being allocated. Even when the categories of *energy* and *transport* are added to the *climate and atmosphere* category the total still amounts to less than 15% of the expenditure captured in the survey.

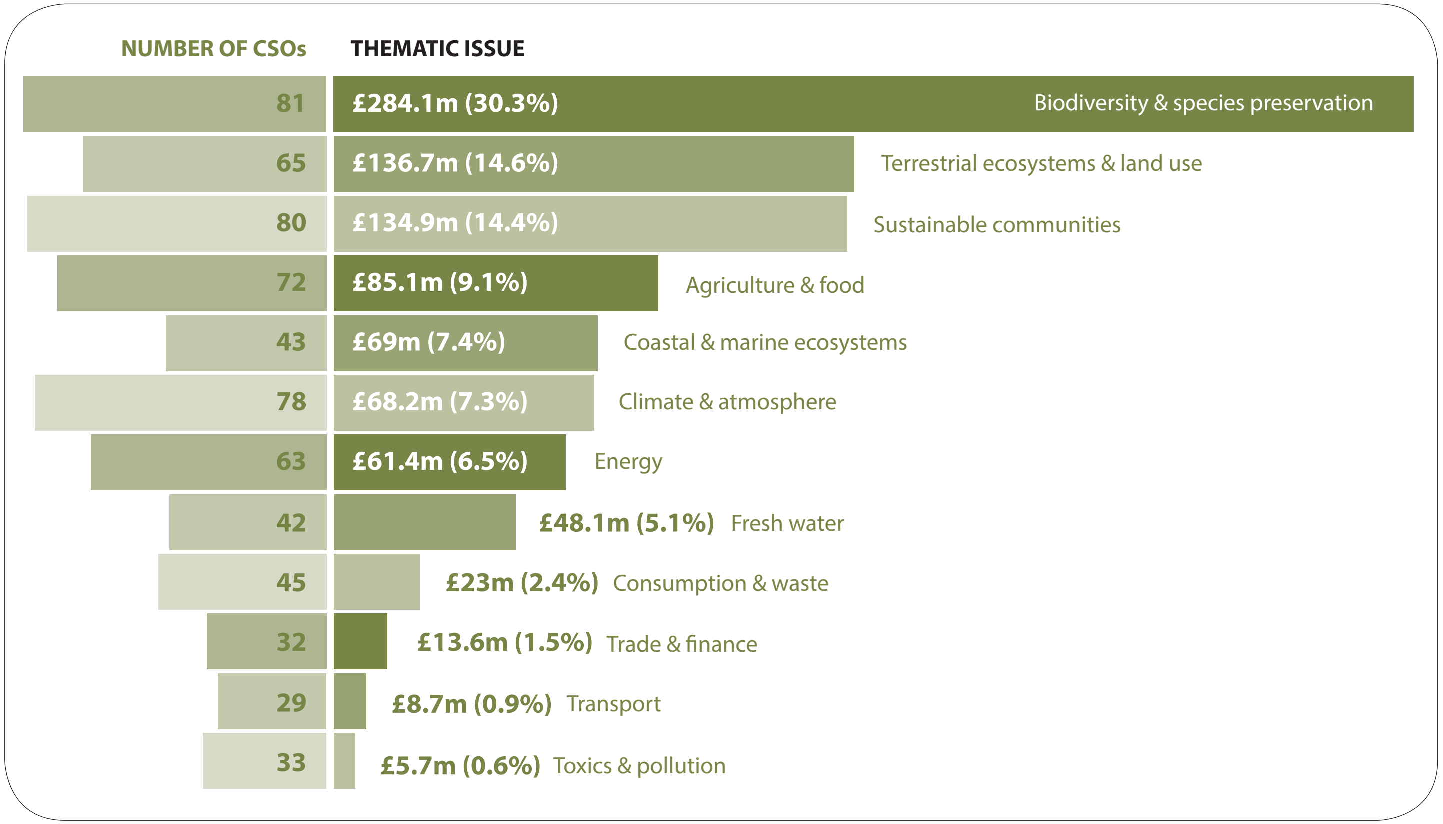

Chart 8 **Expenditure of 139 UK environmental CSOs broken down by thematic issue**

To put the expenditure of £68.2 million on *climate and atmosphere* into context, this is a little over two-thirds of the £100 million that British Gas owner Centrica recently invested in fracking firm Cuadrilla, which has featured regularly in the media in recent months.[23]

The low level of expenditure in relation to the *consumption and waste* category (just 2.4% of the total), also stands out, given the role of consumption in driving many environmental impacts.

23 'Centrica buys into Cuadrilla's Lancashire fracking licence', *Financial Times*, 13th June 2013.

24 Jon Cracknell, et al., *op. cit.*

As with the geographical distribution of resources, foundations would seem to have different priorities from the CSOs they are funding, with *agriculture and food* being a higher priority for foundations (22.2% versus 9.1%) and both *biodiversity and species preservation* and *terrestrial ecosystems and land use* receiving less funding from foundations relative to expenditure by the 139 CSOs.[24]

A little less than a third of the CSOs are what might be termed 'issue specialists', with 75% or more of their expenditure focused in just one thematic issue category. Many organisations work in three, four or five of the thematic issue categories, with some working in as many as 11 or 12.

The chief executives were asked whether they expected the way in which they allocated resources across thematic issue categories to change in the next three years. Nearly a third of respondents expected to see no significant change, whilst the remainder aspired to add new thematic issues to their current work. The issues on which the largest number of CSOs wanted to do more work were: *a) energy; b) fresh water; c) sustainable communities;* and *d) trade and finance*, with a particular focus on finance within this category. It is important to note, however, that there were five times as many references to additional work on thematic issues as there were references to reduced work. Will the sector be able to secure the resources needed to allow this expansion in activity?

WHAT ARE THE IMPLICATIONS?

The majority of the RESOURCES of the 139 CSOs are focused on what might be described as a 'traditional' environmental agenda, relating to biodiversity, land management, terrestrial ecosystems, food and farming, and marine ecosystems. Relatively little money is being directed at tackling climate change, and even less is spent on systemic challenges like rethinking economic growth and progress, grappling with consumption, or reforming the financial system. Yet these are issues that many respondents to the survey saw as vitally important. If the sector wanted to step up its work on these more overarching issues, how could it best achieve this? Would it make more sense for organisations within the sector to focus their RESOURCES on a narrower set of thematic issues, at the same time stepping up their COLLABORATION with other groups? Might this lead to deeper levels of expertise and increased influence? Or is there a virtue in having less specialised organisations in the sector, each carrying out work on a range of issues, and thus providing both competing perspectives and resilience?

Increasing the resources directed at redefining economic growth

The economic crisis is seen as both opportunity and challenge by the chief executives of environmental CSOs. Respondents were asked to what extent they agreed with the following statement: 'Environmental groups should put more resources into trying to redefine economic growth and 'progress' and less into working within the current status quo.' Chart 9 shows the distribution of responses.

There is very strong agreement amongst respondents that more effort needs to be put into redefining economic growth and progress. Just 20 out of the 136 groups that responded to this question disagreed with the statement (scores 0 through to 4), while 92 groups (67.6%) actively agreed (scores 6 through to 10).

On reading the text responses it becomes clear that many respondents felt it is necessary for the sector as a whole to balance work on short-term impacts with efforts to try to redefine concepts like growth and progress. There was a sense that it is larger groups that should take responsibility for the more long-term work:

"This statement may be applicable to some powerful and financially stable organisations with strong brand presence."

Some respondents were uncomfortable with the term 'redefining', seeing that as a rather abstract process when what really needs to happen is the demonstration of alternative approaches on the ground, at the community level. As one respondent put it, we need to "show the reality of a low-carbon economy". There was also unease about the final few words in the statement, 'less into working within the current status quo'. A number of respondents pointed out that the challenge is to redefine these key concepts within the status quo, rather than somehow detached from it. This is not easy, as the quote below reveals:

"We have put resources in – we've led the government horse to the environmental water trough, but we can't make it drink, and putting more money into repeating the same arguments is not a good use of our members' funds."

WHAT ARE THE IMPLICATIONS?

The statement was drafted so as to present respondents with a choice, to shift RESOURCES from work within the status quo to work that grapples with challenges like redefining economic growth and progress. There was strong agreement that this needed to happen. How could this best be achieved in practice? Would it be more effective if a wider range of environmental groups started to raise these questions as part of their work? Or would it be better to try to increase the capacity of organisations that are already seen as having a leadership role within the sector? What are the implications for the FUNDING community, who tend not to put as much of their money into work of this kind, in part due to concern that it may be too intangible?

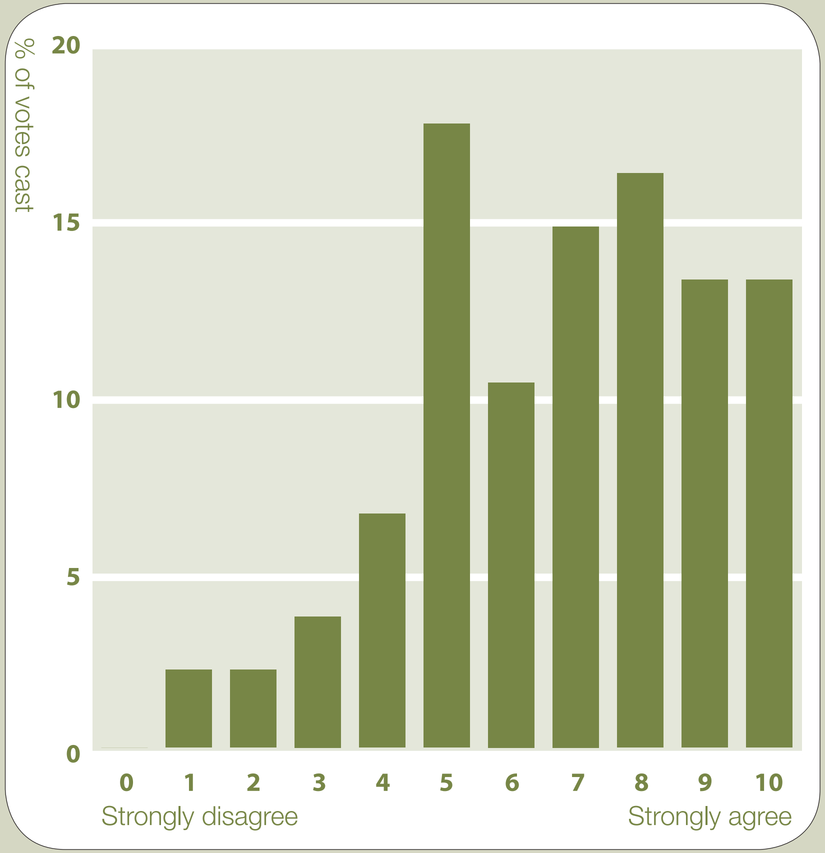

Chart 9 Increasing the resources directed at redefining economic growth

8 What approaches do UK environmental organisations prioritise?

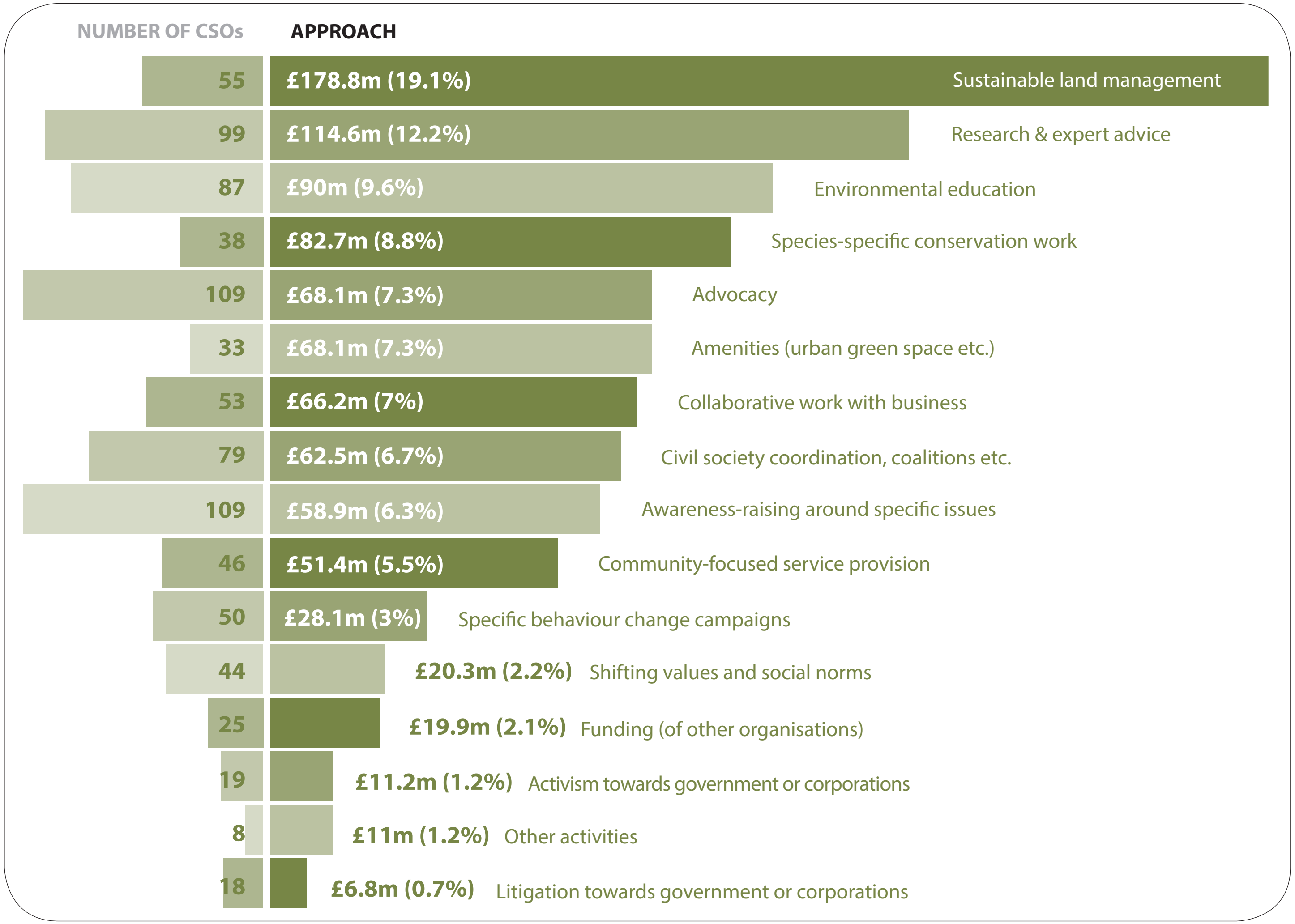

Chart 10 **Expenditure of 139 UK environmental CSOs broken down by approach**

We asked the chief executives to break down their organisations' expenditure across a set of 16 approach categories, such as environmental education, or provision of research and expert advice. Chart 10 shows the results.

Looked at in terms of expenditure, the approaches receiving the most resources are a) *sustainable land management* (19.1%); b) the provision of *research and expert advice* (12.2%); c) *environmental education* (9.6%); and d) *species-specific conservation work* (8.8%). These four categories account for just under 50% of expenditure.

Work directed at *specific behaviour change campaigns*, or to *shifting values and social norms*, amounted to a little over 5% of the total expenditure of the 139 CSOs, at £48.4 million. This is less than a quarter of the money spent on advertising by Procter & Gamble in 2010 (£195 million).[25]

The figures above are heavily influenced by the large budgets of some of the CSOs involved in *sustainable land management* and *species-specific conservation work*, plus the fact that this work is often expensive to carry out. Just 55 out of the 139 CSOs (39.6%) are engaged in sustainable land management, and only 38 (27.3%) in species-specific conservation work.

A different perspective is gained by focusing on the approaches that are used by the largest number of CSOs, as opposed to those receiving the most expenditure. The most widely used approaches were a) *advocacy* (109 organisations); b) *awareness-raising around specific issues* (109); c) *research and expert advice* (99); d) *environmental education* (87); and e) *civil society coordination and coalition-building* (79).

Environmental CSOs are even more eclectic in their use of approaches than in their focus on specific thematic issues. Only 12 of the organisations responding to the survey were focusing 75% or more of their resources on just one approach category, and only 39 focused more than 50% of their resources on one of the 16 approaches. Most of the 139 organisations are using a combination of between four and seven of the approaches listed in order to achieve their objectives.

WHAT ARE THE IMPLICATIONS?

When responses to several of the questions in the survey are combined they suggest there is a core play-book of approaches being used in the sector, comprising awareness-raising and environmental education, civil society coordination, and advocacy informed by research. Throughout the survey respondents set a lot of store on 'expertise' and 'evidence-based research', and the core set of approaches feature strongly in respondents' assessment of which environmental CSOs are most effective (as shown in Section 10 below).

Is this set of approaches sufficient given the scale and complexity of the problems on which environmental organisations are working, or is INNOVATION needed? In particular, is the emphasis on 'evidence-based research' justified, or is there a risk that those resisting change use demands for more and more evidence as a delaying tactic? It is not clear, for instance, that climate sceptics and others seeking to polarise environmental debate (a trend that concerned respondents) are investing heavily in 'evidence-based research'. As with thematic issues, would more specialisation on particular approaches within the sector help to increase its overall effectiveness, and what would the implications be for COLLABORATION?

25 'The top 10 biggest spending advertisers of 2010', *Daily Telegraph*, 29th December 2010.

The role of direct action

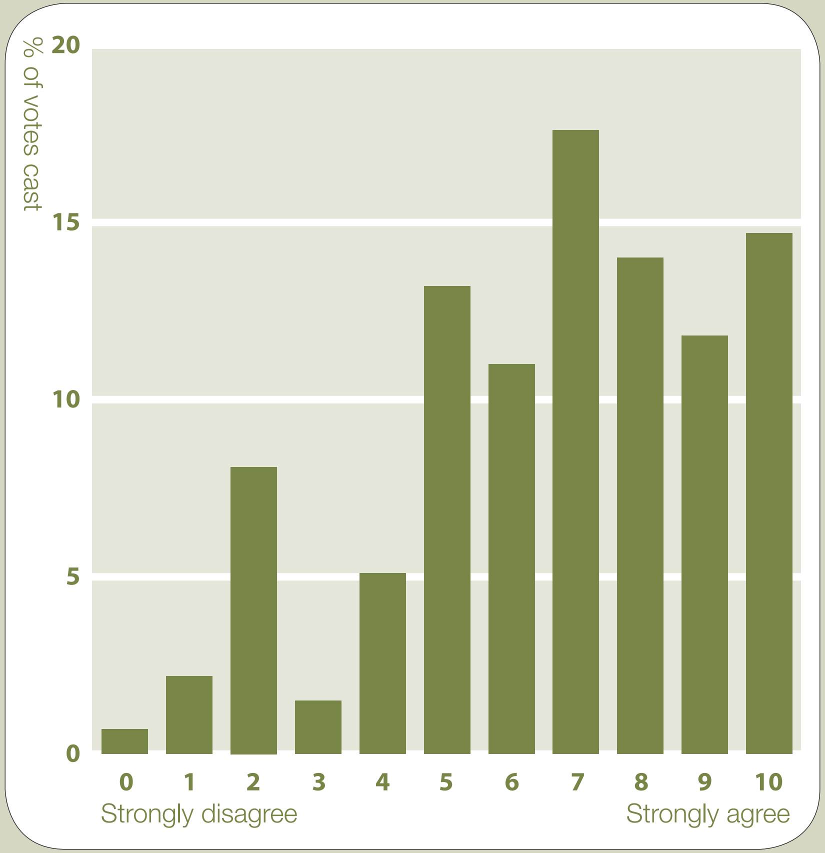

Chart 11 **The role of direct action**

In order to explore how environmental leaders view direct action, respondents to the survey were asked how much they agreed or disagreed with the following statement: 'Non-violent direct action has an essential role to play in addressing environmental challenges even though defenders of the status quo may use it to try to discredit the sector.' The responses from 136 CSOs can be seen in Chart 11.

Many of the most successful social movements have used direct action at some point, yet it appears that many funders and some environmental groups are uncomfortable with this approach to change.

The chart shows that there is strong support from many of those responding to the survey for non-violent direct action, even though their own organisations are in general not engaged in this kind of activity. Nearly 70% of respondents agreed with the statement that non-violent direct action has an essential role to play (responses 6 through to 10).

Looking at respondents' comments it is clear that they see direct action as one set of tactics within a mix, many commenting on the need for a range of different approaches across the sector. Respondents stressed the importance of direct action being a) carefully planned and executed; b) evidence-based; and c) complemented by reasoned and well-argued advocacy work.

The following quote captures the views of respondents well:

"One of our trustees was talking about the suffragette movement recently, and how you had the policy types and then the direct action types like Emily Pankhurst and somehow they coalesced and came up with a strategy that worked well to deliver the objectives. If you think about where we are as a sector, there's got to be space for a spectrum of activities and a mixture of new policy, new thinking, through to direct action."

WHAT ARE THE IMPLICATIONS?

Research on environmental philanthropy suggests that there is very little funding available for direct action per se. The responses to the question about the approaches being used by UK environmental organisations show that just 19 of the 139 responding organisations engage in *Activism directed at either government or corporations* and that activism does not account for more than 30% of the work of any of the organisations responding. Should UK environmental organisations be investing more RESOURCES in support of direct action? Should funders be supporting training, resources, and networks that help individuals and organisations to take action? The importance of this set of tactics is well recognised by respondents, yet it accounts for just 1.2% of expenditure across the 139 respondent organisations.

9 Approaches and skill-sets needing more resources

We asked chief executives which of the 16 approaches they felt UK environmental CSOs ought to invest more money in, going forward, in order to increase the effectiveness of the sector, and also which of 11 skill-sets they thought most needed additional investment. Charts 12 and 13 show the responses, from 137 and 135 CSOs respectively.

Advocacy topped the list with 14.2% of the votes cast, and 82 out of the 137 CSOs answering this question saw it as something that needs additional resources. Behind *advocacy* came a set of approaches with similar scores, namely *environmental education, research and expert advice, civil society coordination and coalition-building, awareness-raising around specific issues,* and *specific behaviour change campaigns*.

This list corresponds closely to the responses to a separate question in which chief executives were asked which approaches their organisations found it most difficult to raise funds for. The top five responses to that question were, in descending order, *advocacy/lobbying, (scientific) research, environmental education, campaigning* and *policy work*. There would seem to be a strong demand from the sector for more capacity in relation to advocacy, research, and environmental education work in particular.

The top five approaches where chief executives see a need for additional resources correlate closely with those being used by the largest number of

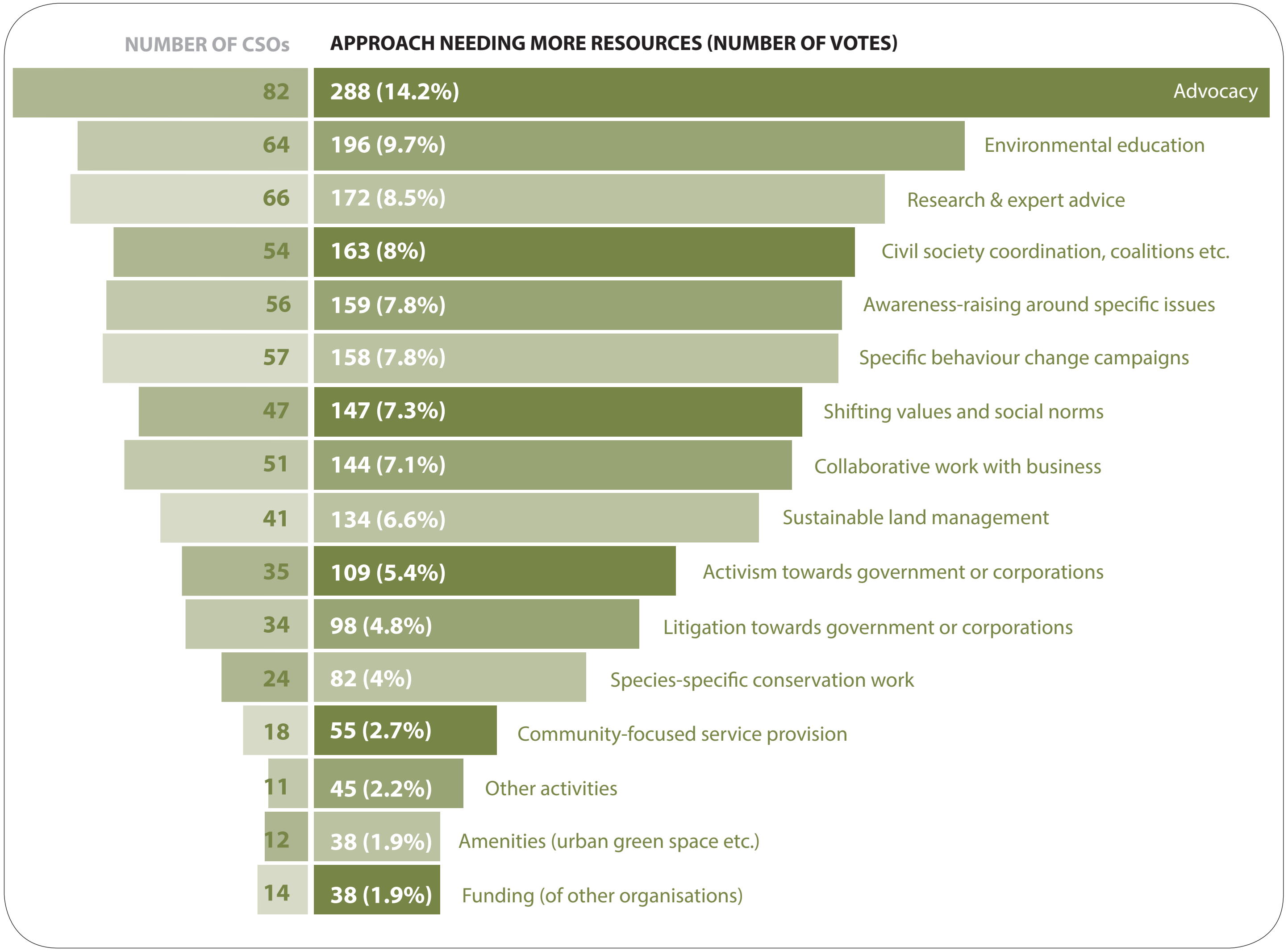

Chart 12 Approaches needing more resources in order to increase the effectiveness of the sector

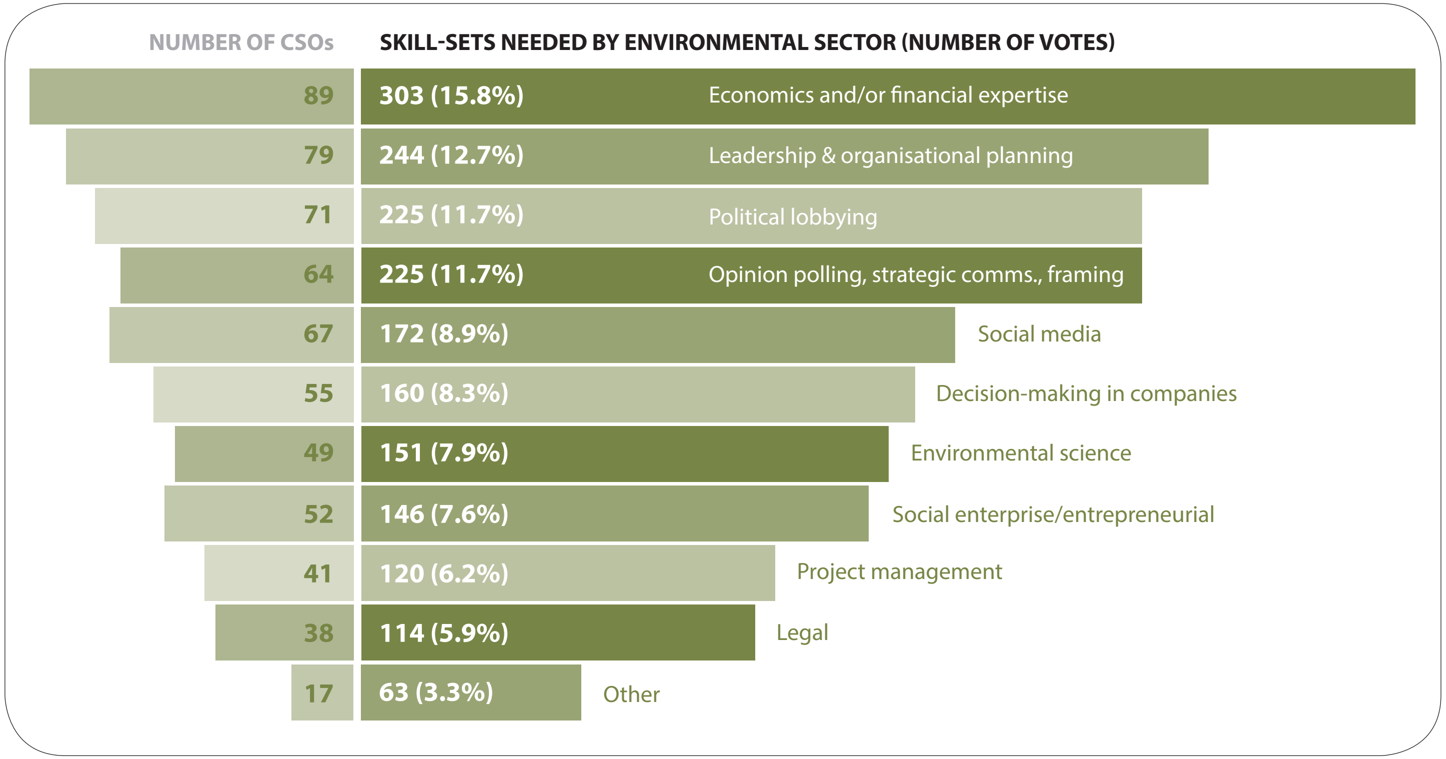

Chart 13 **Skill-sets most needed by non-profit environmental sector**

organisations, albeit in a slightly different order. In Section 8 above they were referred to as forming the core play-book for the sector: *advocacy, environmental education, research and expert advice, civil society coordination and coalition-building*, and *awareness-raising around specific issues*.

Building on the question of which approaches are most in need of additional resources, respondents were asked to rank 11 different skill-sets by the same criterion. Chart 13 shows the results.

Economics and/or financial expertise was seen as the highest priority skill-set for the sector. *Leadership and organisational planning* ranked second, which is consistent with one of the attributes of effective environmental organisations that are discussed in Section 10 below.

The fact that *political lobbying expertise* ranks in third place is interesting given that advocacy is already the most widely used of the 16 approaches. Even though many organisations are engaged in advocacy they still see a need to increase their expertise. And there is clearly a perception that more expertise is needed in *public opinion polling*, *strategic communications* and *framing*. This ties in with the perceived need for more resources to be devoted to *specific behaviour change campaigns* and *shifting values and social norms*, as shown in Chart 12 on the previous page.

PART C: Effectiveness, strengths, and opportunities

10 What constitutes effectiveness?

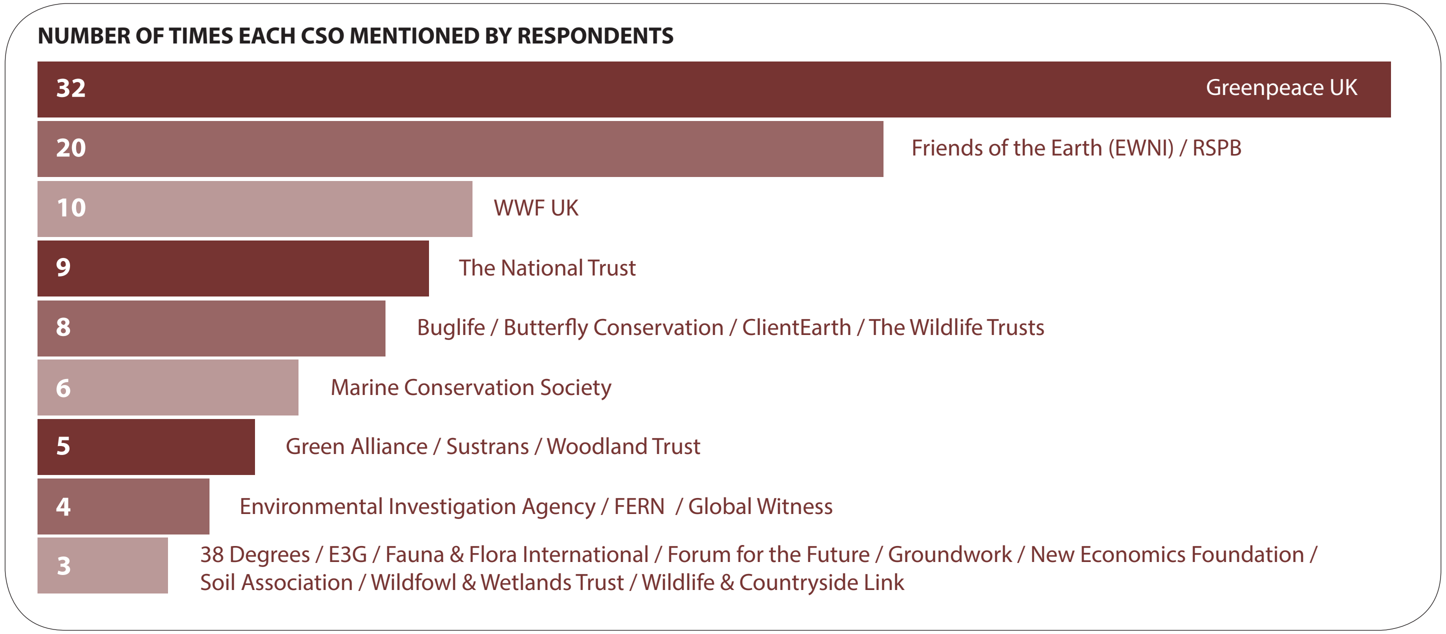

Chart 14 **UK environmental organisations accomplishing the most relative to their resources**

Discussions about what constitutes effective environmental work are common both within the trust and foundation community and amongst environmental groups themselves. In order to explore this issue we asked the chief executives to identify the three non-profit UK environmental organisations (other than their own) that they felt accomplish the most, given the resources at their disposal. They were then asked why they thought the organisations they had identified were effective.

This question was answered by 121 CSOs, and together they identified 131 different organisations that had accomplished good outcomes relative to their resources (a full list is available in Appendix D). This reflects the diversity of the organisations taking part in the survey, but also reveals differing understandings of what constitutes effective work.

Chart 14 shows the 25 organisations that were mentioned three or more times by their peers. Greenpeace UK is the clear front runner, with 32 mentions. Friends of the Earth (EWNI) and the RSPB tie for second place, with twice as many recommendations as fourth-placed WWF UK. Many of the CSOs in the list are household names with strong public brands, and indeed a strong brand was seen as one of the attributes of effective organisations. Respondents also highlighted the vital importance to the sector of smaller organisations, which were less likely to be named multiple times. Chart 15 provides details of the income for the 25 organisations, and the number of full-time-equivalent staff that they have working on environmental issues

Respondents felt that Greenpeace was effective because it has the ability to put issues on the agenda and give them a high profile through the use of direct action and clever communications strategies. It is prepared to be bold in its demands, and has strong values on which it doesn't compromise. Good quality research and negotiation behind the scenes complement the more visible activism. The global nature of its campaigns (in conjunction with other Greenpeace offices overseas) was also seen as important.

Effective communications and good quality research were also seen as Friends of the Earth hallmarks, along with the ability to mobilise its large membership and to harness public support. Friends of the Earth was seen as a respected/established organisation, which in recent years has been increasingly effective in its political lobbying work. The diversity of issues on which the organisation works was seen as a strength, as was its willingness to stick with issues over time.

The RSPB is also seen as an organisation with a strong evidence base underpinning its work. Its size, with a membership of one million, gives it political influence, and respondents felt that the membership was often harnessed effectively. The organisation is seen as having a clear focus and strong leadership. It achieves good environmental outcomes through the work it undertakes on the ground, with its own nature reserves and land, and is seen as particularly good at collaborating with and supporting smaller environmental organisations.

CSO	INCOME (£)	FTE ENVIRONMENT STAFF
Greenpeace UK	13,151,726	89
Friends of the Earth	10,147,715	146
RSPB	119,677,000	1,683
WWF UK	66,177,000	312
The National Trust	435,918,000	5,285 [1]
Buglife	1,010,912	27
Butterfly Conservation	3,288,483	55
ClientEarth	3,276,405	52
The Wildlife Trusts	137,000,000	2,090
Marine Conservation Society	4,879,240 [2]	47
Green Alliance	1,162,739	14
Sustrans	48,872,000	183
Woodland Trust	31,878,704	291
Environmental Investigation Agency	1,370,000	27
FERN	1,475,373	10
Global Witness	7,863,000	19
38 Degrees	1,402,466	2.5
E3G	1,570,000	25
Fauna & Flora International	17,387,616	368
Forum for the Future	3,800,000	64.2
Groundwork [3]	131,000,000	1,900
New Economics Foundation	3,286,061	12
Soil Association	8,983,634	182
Wildfowl & Wetlands Trust	16,931,000	114
Wildlife & Countryside Link	190,212	5

Not all of the organisations shown took part in the survey. Some declined and some were not in the list of 300 organisations invited. In this case the data shown is from their annual reports for the corresponding financial year, usually 2011/12.

The income figures relate to the total income of the organisation. In some cases income is being used for non-environmental work. The FTE environment staff figure therefore provides a more accurate indication of capacity.

1 Many of the National Trust's 5,285 FTE staff will not be working on environmental issues but we were unable to get a breakdown of this, so have included the total staff figure from their accounts.

2 The Marine Conservation Society's income in 2011/12 was boosted by a one-off grant of more than £2.7 million

3 Aggregated income and staff figures for the 28 organisations that make up the Groundwork Federation.

Chart 15 **UK environmental organisations' income and numbers of full-time-equivalent staff working on environmental issues**

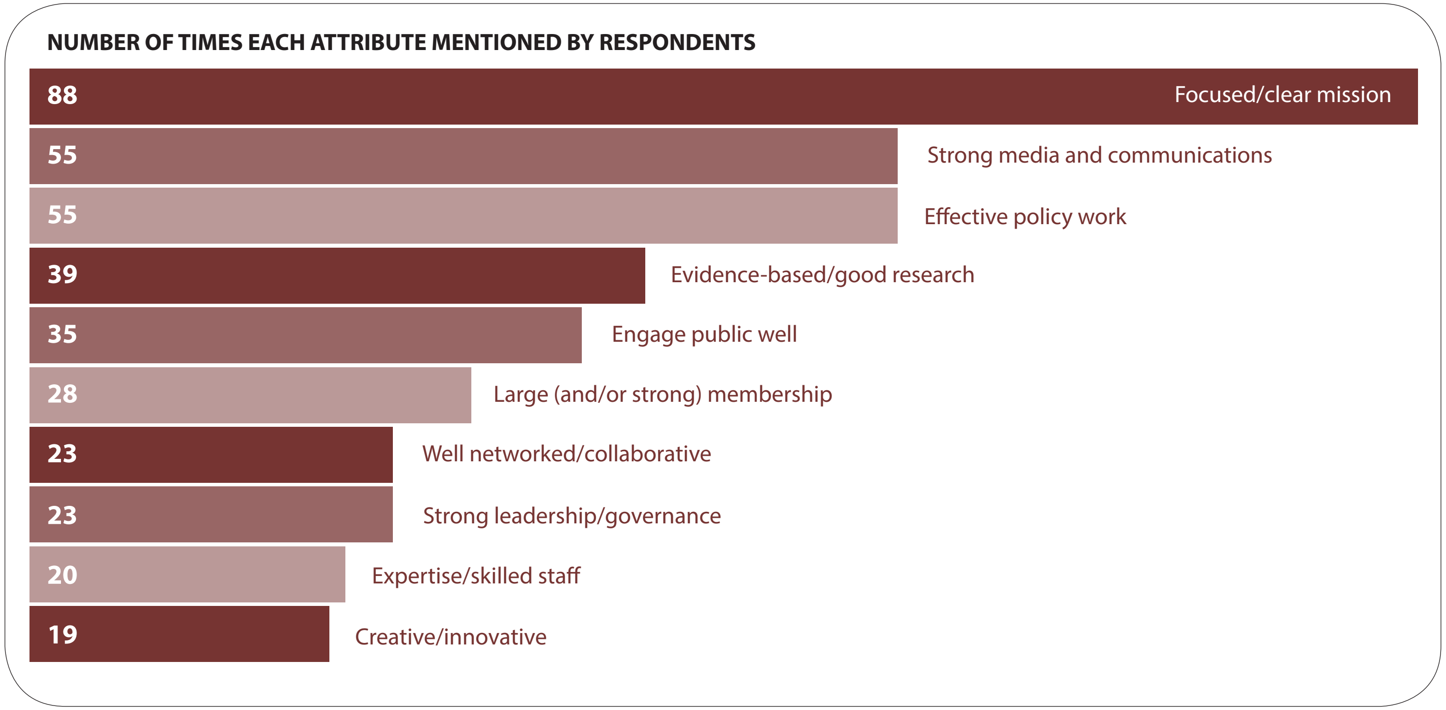

Chart 16 **Top ten attributes of effective environmental organisations, as seen by their peers**

The 121 responses to the question about why these organisations were effective were aggregated together and grouped into 41 categories. The top ten attributes are shown in Chart 16.

It is unsurprising that a *clear mission and vision*, plus *strong leadership* are seen as important, although there was some tension between respondents who saw a tight focus on a limited number of issues as a virtue (the great majority of respondents) and those who saw a willingness to work on a diversity of topics as a strength. *Expertise* also emerges as an important attribute, in the categories *evidence-based/good research* and *expertise/skilled staff*, reinforcing the point made in Section 8 above. Given that advocacy is the most widely used approach amongst the organisations taking part it is not surprising that *effective policy work* is seen as an important attribute of effectiveness. The importance of having a *large membership* and being able to *engage the public* is also clear. Finally there is the ability to collaborate with other organisations and to be *creative and innovative* in response to changing circumstances.

By contrast, *risk-taking* received just four mentions, as did *working with non-traditional audiences*. Other attributes that were identified as important but which received relatively low rankings were *independence* (7), *focused on value changes* (8), and *persistence/patience* (10).

WHAT ARE THE IMPLICATIONS?

The similarity in perspectives from CSOs and foundations is interesting, with both groups putting a lot of emphasis on attributes that might be described as managerial or 'professional' in nature. These include being focused, communicating well, doing good research, engaging members and the public, having strong management, and so on. By contrast, risk-taking, independence, changing values, and engaging non-traditional audiences were seen as less important. What would it look like if the sector was to INNOVATE and take more risks in the future? What would be needed in order to allow that to happen?

A foundation perspective

The responses from environmental CSOs are complemented by those from 37 foundations that are members of EFN, who were also asked which environmental organisations they feel achieve the most relative to their resources. Chart 17 shows the organisations receiving two or more mentions from foundations.

Six organisations, Greenpeace UK, ClientEarth, Green Alliance, New Economics Foundation, Friends of the Earth and WWF UK appear in both Chart 14 and Chart 17. The fact that Carbon Tracker appears in second place in the foundation list is interesting, given that this is a relatively new initiative. It suggests that foundations may be well placed to spot emerging new ideas and approaches, given that they have something of a bird's eye view of the sector. The European Climate Foundation is first and foremost a grant-making organisation, and is not based in the UK, but has been included in the list as foundation peers clearly find its work important.

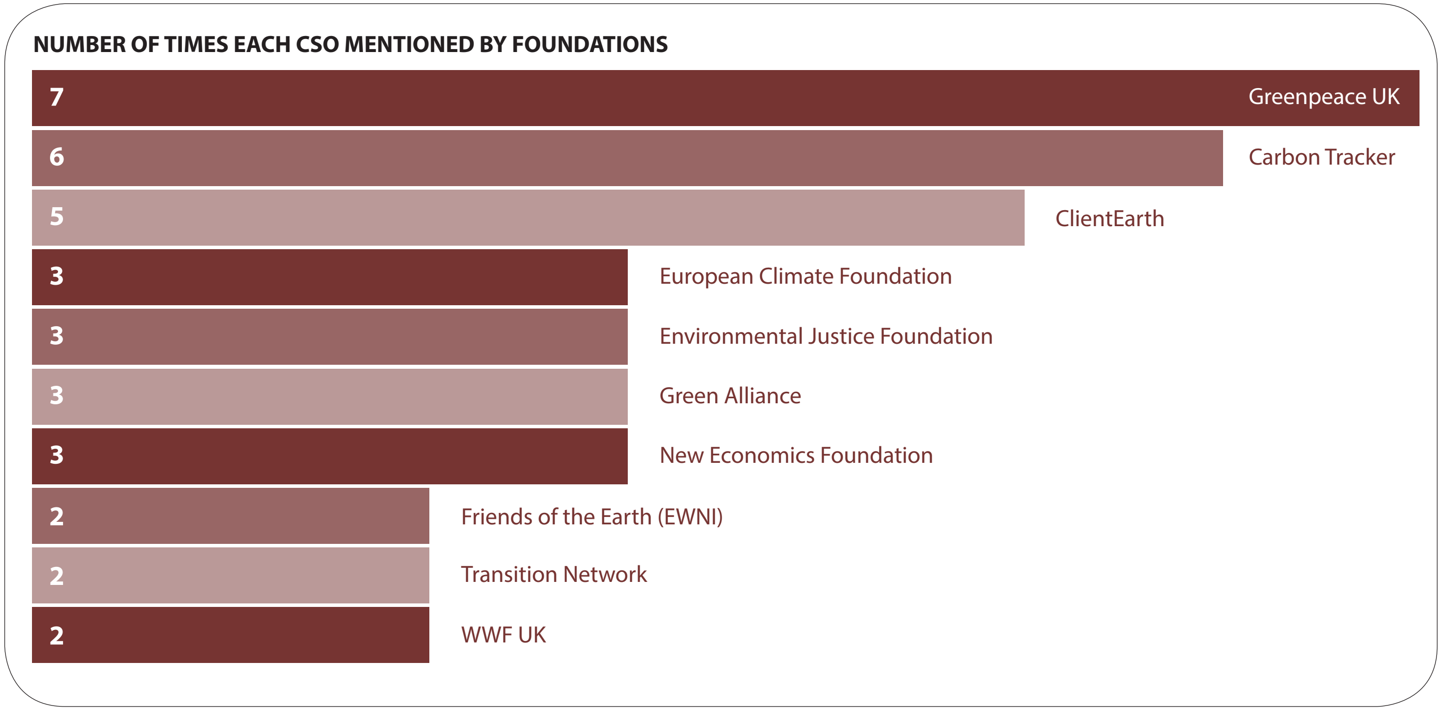

Chart 17 **UK environmental organisations achieving the most relative to their resources, as seen by EFN foundations**

Looking at the reasons that foundations gave for why they saw organisations as being effective, Greenpeace was seen as being focused, strategic, and large enough to create change, uncompromising in its values but tactically pragmatic. Carbon Tracker was identified for the quality of its research combined with its ability to garner broadsheet media coverage for its analysis. ClientEarth was seen as effective because it focuses on providing legal expertise to the sector, acting strategically and imaginatively and winning some important cases.

In general, foundations highlighted the following reasons for why organisations were effective: a) that they are tightly focused; b) their work is evidence-based; c) they have clear strategies; d) they are effective at engaging local populations; e) they have 'niche expertise' (for example ClientEarth in legal work, or Green Alliance in politics); and f) they are successful at securing media coverage.

11 The sector's biggest strengths

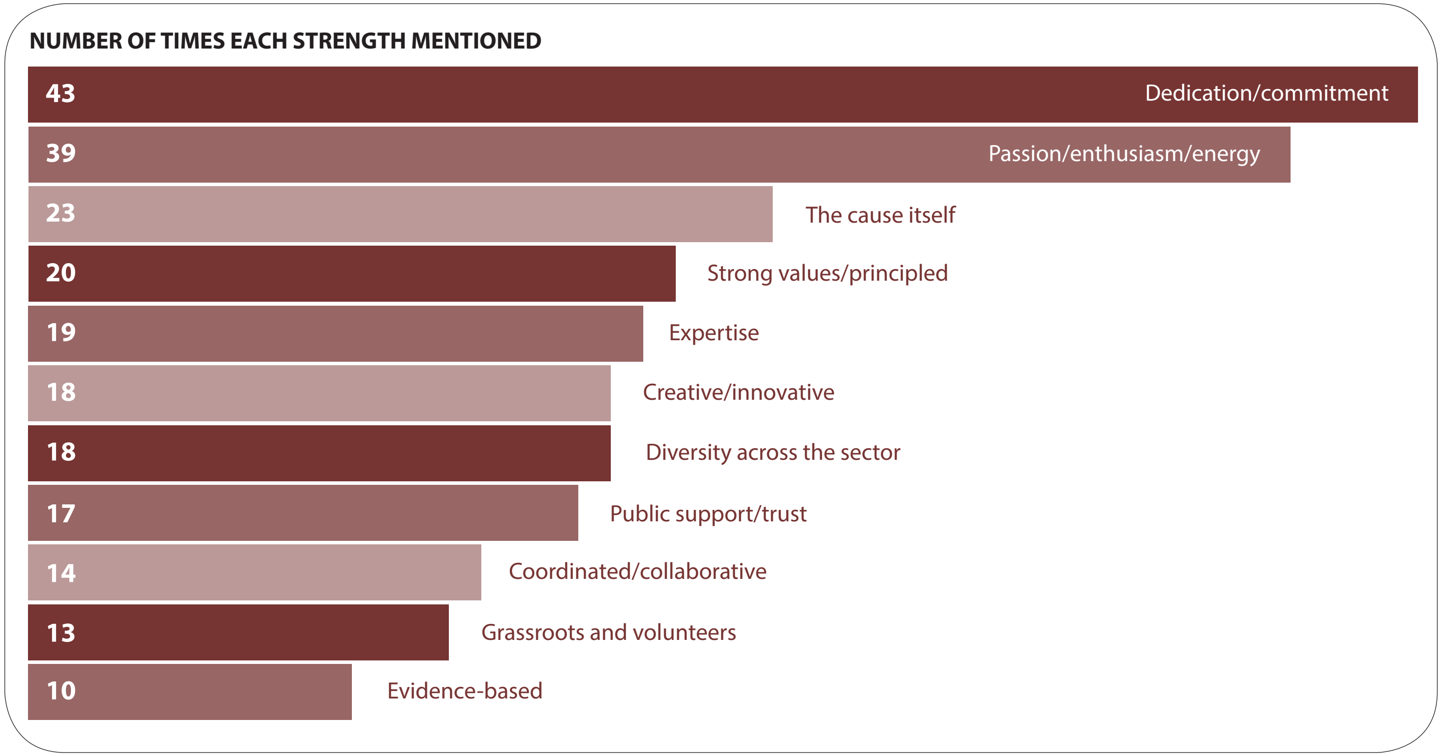

Chart 18 **Strengths of the environmental sector – responses with 10 or more mentions**

We were also keen to get an understanding of what chief executives saw as the environmental sector's biggest strengths. Chart 18 summarises the responses from 126 CSOs.

Responses were dominated by what might be termed 'people qualities'. Many respondents talked about the dedication, passion, commitment and enthusiasm of their staff, volunteers, and supporters. There was a sense that hard work pervades the sector.

As a result of these qualities and the cause itself there is perceived to be wide public support, a good deal of trust, and large membership numbers for environmental CSOs, bringing grassroots and volunteer strength.

Expertise and a commitment to evidence-based work were again seen as strengths of the sector, as in the assessment of what makes for an effective environmental organisation.

In addition the sector is seen as being creative and innovative, and often quite good at collaborating. The diversity of the sector, in terms of different types of groups with different approaches and tactics, is also seen as a core strength.

The word cloud opposite gives a visual sense of the strengths of the sector. 'Recognition of harm' is used as shorthand for the sense that members of the public recognise that environmental impacts are increasing.

Foundation staff responding to the same question echoed many of the responses from environmental CSOs, identifying passion/commitment/enthusiasm as the top strength of the sector, with the strong-evidence base and expertise of many groups in second place. Widespread trust amongst the public was also seen as a particular strength.

WHAT ARE THE IMPLICATIONS?

Both leaders within the sector and philanthropic foundations supporting it see the sector's key strengths as passion, commitment, hard work etc, rather than an ability to effect change as such. How could the sector INNOVATE in order to capitalise on its strengths going forward, so as to deliver greater change?

Chart 19 Biggest strengths of the UK environmental sector

12 Opportunities for the sector

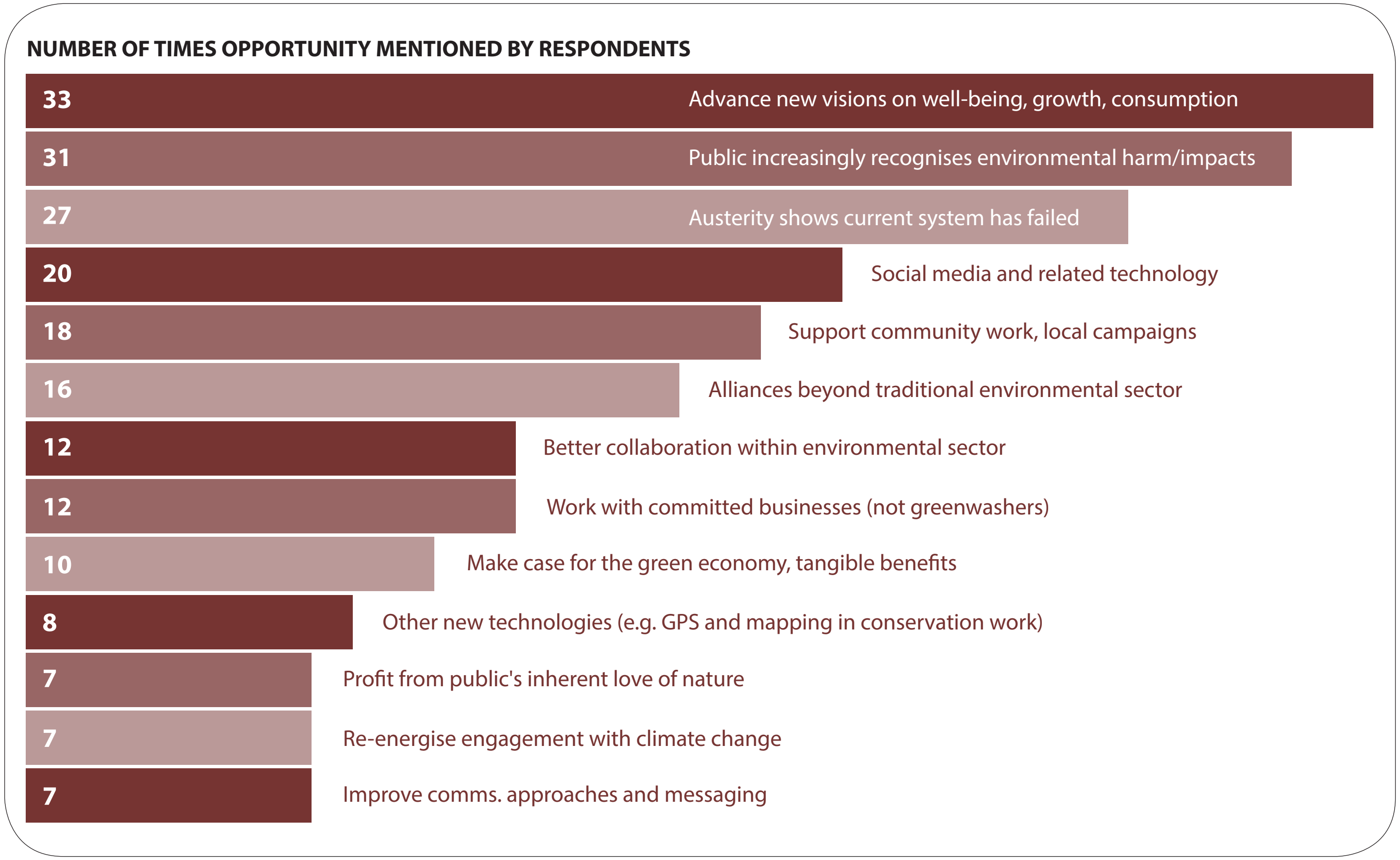

Chart 20 **Biggest opportunities for the environmental sector over next three to five years**

We asked the chief executives what they saw as the biggest opportunities and challenges for the sector over the next three to five years, and also what issues they felt were lying 'just around the river-bend', receiving inadequate attention from CSOs and funders.

Concerns about funding topped the list of responses to both the 'challenges' and 'river-bend' questions. These included concern about cutbacks in absolute levels of funding for the sector, and also frustration with the way in which funders provide support. We plan to publish a separate short report with a summary of comments about funders. The focus in this section and the one that follows is on opportunities and river-bend issues other than funding.

OPPORTUNITIES

Respondents identified a broad range of opportunities for the sector over the next three to five years, which were grouped into 36 different categories. The top categories, based on responses from 125 CSOs, are shown in Chart 20.

The following themes emerged:

a The economic crisis and resulting austerity policies are seen by respondents as a great opportunity to present an alternative vision in relation to well-being, economic growth and consumption. There was a strong feeling that the public recognises that the current system is broken, and that they are therefore ready for alternative ideas. The following quote captures the idea well:

"The growing impacts of climate change will legitimise the kinds of approaches which many in the environmental sector advocate. The long-term stagnation of many Western economies could bring about new impetus to find ways to increase human well-being in a way that is not wholly dependent on economic growth and increased consumption."

b Allied to the sense of an opportunity to capitalise on the economic crisis there was a strong feeling that the public increasingly recognises environmental harms and impacts. For instance:

"The effect of environmental degradation is becoming increasingly obvious even to novices and/or sceptics and the impacts are being felt at a personal level. As a result public awareness of these issues has increased and we need to ensure that the impact of our detrimental behaviour is highlighted at every opportunity."

"The very clear evidence of environmental damage may encourage people to feel that they must do something!"

"[There is a] growing realisation across all areas of society that extreme weather and resource scarcity will fundamentally change the way that society and businesses operate."

This confidence was perhaps surprising given the number of chief executives who pointed to increased public apathy in respect of the environment when describing the challenges faced by the sector (Sections 14 and 15).

c Social media tools constituted a qualitatively different type of opportunity in the eyes of respondents. There was widespread optimism about the potential to use new communications technologies to reach out to younger people in particular, and to enable more effective international collaboration.

d The importance of working at the community level also came across clearly, with a feeling that communities needed to wrest back control of decision-making and to come up with solutions of their own making.

e Allied to this was the need to frame environmental concerns in everyday terms, as suggested in the following quote:

"Showing that environmental improvement matters for people's everyday lives, that they can improve health and welfare of people [is important]. The risk with a focus on climate only, though hugely important, is that people think that environment does not mean anything to them. Clean air, clean water, warmer homes, green spaces to enjoy all matter for people."

f An additional set of opportunities related to the way in which the sector works, with respondents seeing opportunities both in terms of reaching out to CSOs that are not traditionally seen as environmental, and also improving the collaboration between groups within the sector. As will be seen in the sections below, collaboration is also identified as a challenge for the next three to five years.

WHAT ARE THE IMPLICATIONS?

Responses to the survey suggested confusion with regard to public attitudes towards environmentalism, which is interesting in the context of the call for more expertise (SKILL-SETS) in relation to public opinion polling, strategic communications and framing. The need to invest RESOURCES in different ways of working also comes across, with respect to social media, working from the bottom up, engaging new constituencies, and reframing issues. How could these changes be achieved in practice? What sorts of INNOVATION are needed? What would the implications be for the current modus operandi of the sector? What role might FUNDERS have in facilitating change?

A foundation perspective

Foundations responding to the same survey question shared the feeling that the public increasingly recognises environmental harms and impacts and that in this sense the political debate is moving towards the sector. As with the responses from the CSOs, foundations also saw increasing public apathy as a problem. Despite this many of the responses from foundation staff were decidedly optimistic in tone:

"The lack of action on climate will sooner or later come up against forces that impel change, whether these are weather events, financial realities, or some sort of sea change in the way scientific evidence and consensus at last breaks through into public and political consciousness."

"It is becoming increasingly difficult to ignore the fact that our environment is in rapid decline. Also, people may be on the lookout for something other than economic growth to give them hope and meaning."

The other main opportunity identified by foundations is a widening of the sector's base to outreach actively to non-environmental organisations and work reciprocally with a much wider range of civil society partners, for example those working on health issues, poverty and social justice, and with the elderly.

PART D: External and internal challenges

13 Issues lying 'just around the river-bend'

We asked chief executives to tell us what they saw as the principal 'just around the river-bend' challenges, and 127 CSOs responded to the question. The key themes that emerged were:

• DEMOGRAPHIC SHIFTS WITHIN THE UK POPULATION. As the UK's society ages, respondents referred to the need for the environmental sector to rethink the kinds of services it provides and the way in which it frames its work, as well as working out how to cope with a potential loss in income from individuals. Responses to this question highlighted a sense that young people are less interested in the environmental agenda, something that stands in contrast to the opportunity identified above to engage younger generations.

• CLIMATE CHANGE. The second set of concerns related to climate change as an issue. Whilst hardly an emerging issue, there was a strong feeling from respondents that time is running out to address climate change, and that this is leading to both disillusionment within the sector and a potential threat to its credibility with the public:

"Limiting global temperature increases to the two degree safe ceiling recommended by science is becoming increasingly unlikely. Three, four, even six degree rises are predicted. These scenarios would lead to disastrous consequences ... If these scenarios come to pass, then the entire raison d'etre of the global environmental movement … will be starkly called into question. Thus the next three years are absolutely crucial. Momentum on climate change built up in the years between 2000 and the Copenhagen talks in 2009. Then, briefly, momentum was lost. With the re-election of President Obama, and increasingly frequent extreme weather events, climate change is back on the agenda…"

Other respondents also pointed to the need to build an "ongoing, self-sustaining grassroots movement" on climate change in the run-up to the 2015 meeting of the UN Framework Convention on Climate Change where a successor agreement to the Kyoto Protocol needs to be finalised. Respondents also pointed to the need to look at specific climate change impacts in more detail, and to address the way in which climate change mitigation policies impact vulnerable groups in society. The polarisation of the climate change debate (in some quarters) and the lack of public interest in the context of the recession were seen as particular challenges that needed to be addressed.

• AUSTERITY AND THE DRIVE FOR ECONOMIC GROWTH. The third set of concerns links directly to those in the 'opportunities' and 'challenges' sections above and below, and relates to the ongoing economic recession and its impact both on public engagement with the environmental agenda, and the short-term preoccupation of governments with economic growth.

Funding cutbacks, the challenge of climate change, and the consequences of austerity and recession are all being felt by the sector already. The authors' hope with the river-bend question was that it would be possible to identify trends and issues that have only recently emerged, or will be felt in the future.

- RISE OF THE BRICS. The most important of these trends from the perspective of respondents was the shift in economic and political power to the emerging BRICS groups of countries (Brazil, Russia, India, China and South Africa), and the rapid growth in consumption as the increasingly urbanised middle class of these and other developing economies expands. As one respondent put it:

"The key issue for us … is the rapid urbanisation in China. Decisions are being made right now that will have down stream carbon effects that dwarf all carbon reduction plans in the UK, and yet no one is paying any attention to this."

Nine of the CSOs responding to the survey flagged this eastwards shift in power as an issue, with questions posed as to how UK environmental organisations could best support the development of civil society and environmental awareness internationally, and what levers might be available to influence political and corporate decision-making in these countries.

- OTHER RIVER-BEND ISSUES. In addition to concern about this geo-political shift, a number of specific thematic issues emerged as meriting attention from both environmental groups and funders. This list was topped by concern relating to food security and food prices, followed by the linked issues of land-grabs and land tenure, and also water scarcity and pollution. Rising fuel prices, and resource scarcity more broadly, were seen as important issues, driven by population growth as well as rising consumption. Respondents expressed concern about the control of renewable energy, about unconventional fossil fuels and fracking, and about biomass and biofuels policies and the use of biodiversity offsets (and other forms of offsetting).

WHAT ARE THE IMPLICATIONS?

Text responses to other questions in the survey pointed to the difficulty that chief executives in the sector have in finding time to think about emerging trends in society (INNOVATION), or changes to the way in which politics is being conducted. Respondents identified a lack of effective 'horizon-scanning' within the sector, and a lack of systems thinking (SKILL-SETS). One commented:

"Sometimes UK environmental organisations are not dynamic enough in responding, nor do they always scan horizons effectively for upcoming issues and contradictions. Effective systems thinking is still lacking."

Are there ways that philanthropic funders could COLLABORATE with CSOs to help address these gaps in capacity?

14 External challenges for the sector

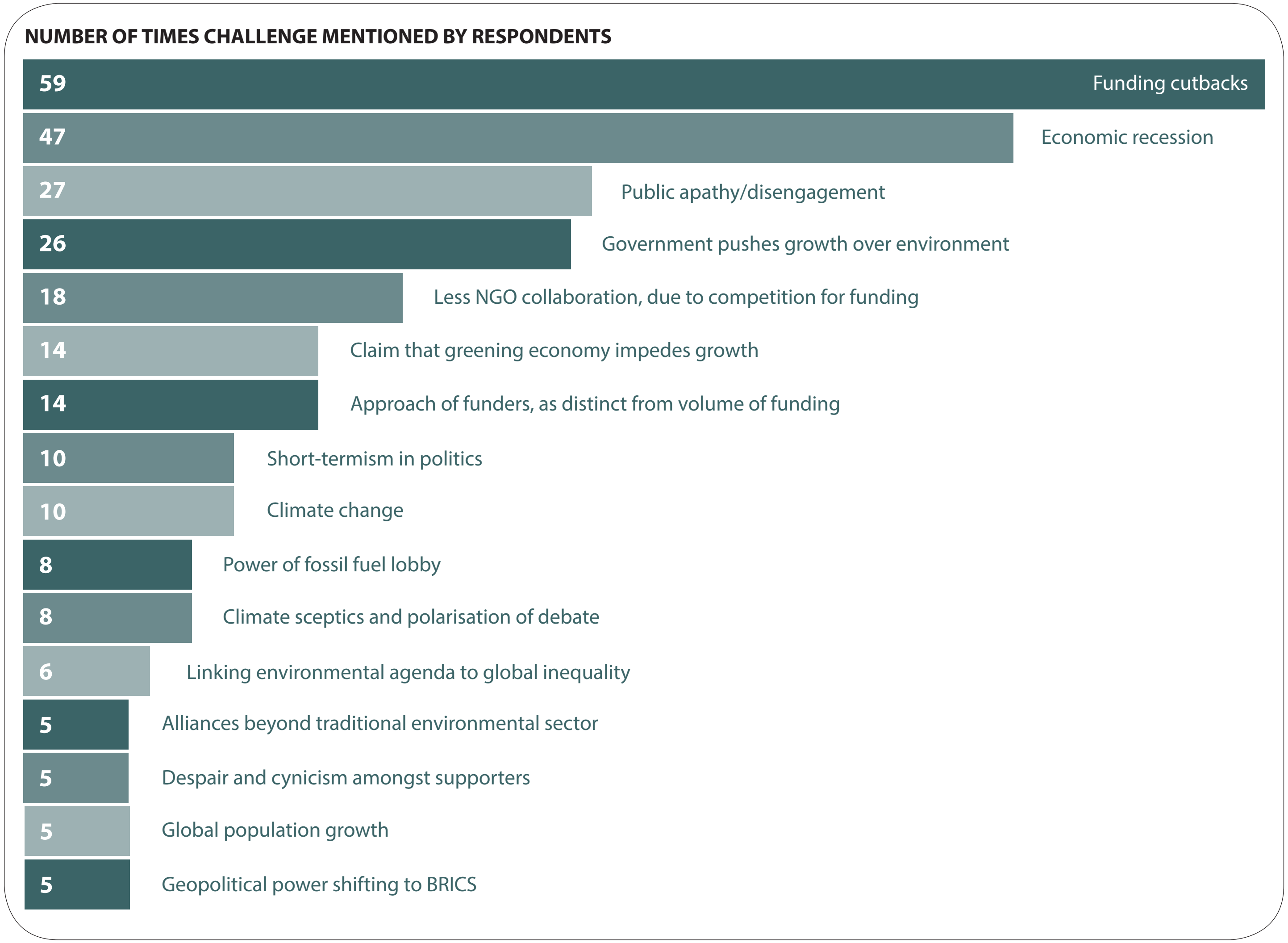

Chart 21 **External challenges for environment sector over the next three to five years**

Respondents generated a very long list of challenges for the sector, which were clustered together into nearly 70 distinct categories. The most frequently mentioned challenges are shown in Chart 21, which draws on responses from 125 CSOs.

Key themes that emerged include:

- THE CURRENT ECONOMIC RECESSION. This was seen as having three major impacts for the sector: a) a significant reduction in funding, both as a result of cutbacks in government spending and also donations from individuals; b) public apathy and disengagement from the environmental agenda due to more immediate day-to-day worries; and c) an excuse for the government to push the environment down the political agenda in its determination to promote economic growth.

- THE DETERIORATING UK POLITICAL CONTEXT. Concern about the political context in the UK came across very clearly from the responses to the survey, with respondents highlighting challenges including a) claims that greening the economy would impede growth; b) the short-termism of the political system; c) the power of the fossil fuel lobby; and d) the growth of climate scepticism and attempts to polarise the environment as a political issue. Respondents described the situation in these kinds of terms:

"Government desperation to reboot the conventional economy at almost any price, and the consequent

undermining of previously hard-won environmental protections and legislation. • Scale, urgency and complexity of the environmental issues we face. • The complexity and intransigency of politics to enable transformational change. • The continued dominance of single issue funding that undermines the opportunity for bigger-picture investment in transformational change. • Achieving cut-through and relevance with the wider public to inspire action, particularly in a time of relative economic hardship and insecurity for much of the population, and constrained organisational budgets."

"Avoiding being put into the naughty corner as enemies of prosperity and as causes of high household energy bills. Dealing with declining membership income and funding. Avoiding the Conservatives (and media) following the Republicans as climate change sceptics."

• IMPACTS ON COLLABORATION AND FOCUS WITHIN THE SECTOR. In addition to the challenge for individual organisations of responding to cuts in funding and a deteriorating political context, respondents highlighted the risk that the sector as a whole would become less collaborative because of increasing competition for resources. This concern is explored in more detail below.

WHAT ARE THE IMPLICATIONS?

Concerns over the deterioration in political support for environmental action in the UK dominated the responses to this question. Yet we saw earlier that only a third of the RESOURCES of UK environmental CSOs are being directed to work at the national level and also that leaders in the sector see a need for more SKILLS in relation to political lobbying. Might it be the case that the strong focus on expertise and evidence-based work has led to an undervaluing of political strategy? If so, how could FUNDERS help to address this problem?

A foundation perspective

Foundation staff responding to the same question about challenges for the sector strongly agreed with the chief executives about the challenge posed by economic austerity, and the need to counter calls for growth at any cost. They also expressed concern about the deteriorating UK political context, and about public apathy in relation to the environment. The need to respond to climate change deniers is also something that foundations see as a pressing challenge.

Can the existing political system deliver the environmental outcomes society needs?

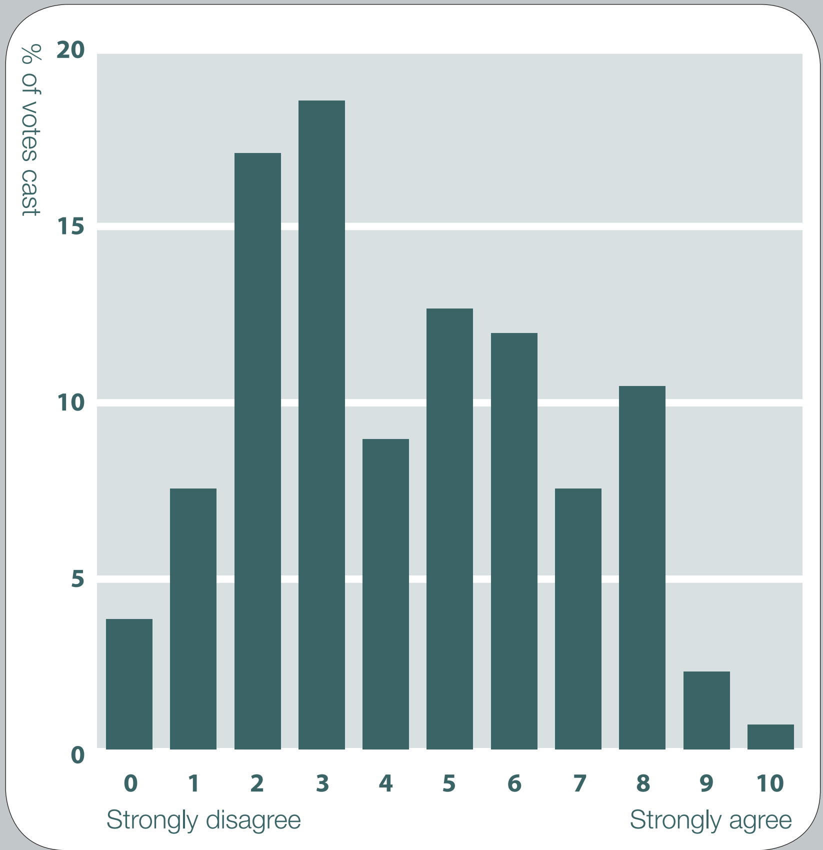

Chart 22 **Can the existing political system deliver?**

Respondents were asked to what extent they agreed with the following statement: 'Working through the existing political system will deliver the environmental outcomes society needs.' The intention was to try to measure how much confidence the sector's leaders have in the current political system, but this statement proved difficult to draft, and responses were diverse, as shown in Chart 22.

A majority of the 136 respondents disagreed with the statement, and were sceptical that the current political system will deliver the environmental outcomes that society needs. The highest scores were gained by responses 2 and 3 on the scale (16.9% and 18.4% respectively), and scores 0–4 accounted for 55.1% of responses. Looking at the comments of respondents a number of themes stand out: a) the preoccupation of the current political system with economic growth; b) the short-termism of political decision-making, set against the long-term action needed for environmental protection; c) concerns over accountability, and in particular over the influence of corporate lobbying on decision-making; and d) whether environmental groups might make more rapid progress towards their goals by focusing more of their effort towards working with business. Many respondents recognised a need to work within the existing system whilst at the same time trying to improve the way the system performs, and this sentiment is well captured in the following quote:

"It is vital to engage with the existing political system, because governance and law sets minimum standards in society, embeds change and can bring everyone collectively closer to a sustainable future. We can help to raise the bar through political engagement. However, the political system tends to trail behind civil action. Political change in democracies draws strength from public opinion and proven solutions in practice, not from theoretical arguments. The existing political system will only deliver the environmental outcomes society needs if it is constantly challenged to raise the bar by wider society (e.g. through community-level action)."

WHAT ARE THE IMPLICATIONS?

Is there a need for UK environmental organisations to engage more actively in political reform? For example, should environmental organisations put more RESOURCES into attempts to regulate lobbying? Are there examples from within the UK, or other countries, of initiatives where environmental organisations have helped overcome the short-term nature of political decision-making?

15 Internal challenges for the sector

In Section 10 we outlined the skill-sets that leaders in the environmental sector feel are most in need of additional investment. The top four skill-sets, in order, were economics and/or financial expertise, leadership and organisational planning, political lobbying expertise, and expertise in public opinion polling, strategic communications and framing. We asked the chief executives what it is that stops UK environmental organisations from acquiring these skill-sets and 124 of them replied.

This proved to be a very revealing question, with respondents not holding back in expressing their frustration and concerns in relation to funders, and with the limitations of the sector. A number of themes emerge strongly from the text responses, and these fall into two categories: a) funder preferences, resourcing and time; b) a reluctance to move away from tried and tested approaches.

A) FUNDER PREFERENCES, RESOURCING AND TIME

• LACK OF RESOURCES. Eighty-one of the CSOs responding to the question identified a lack of resources as being a key barrier to acquiring additional skill-sets, with a strong emphasis on the unwillingness of many funders to provide either core funding and/or 'patient' ongoing funding that would allow their organisation to invest in new skills. Pressure from funders on organisations to minimize their overheads in funding bids was singled out as a problem. The point was also repeatedly made that acquiring new skill-sets takes time. Continuity is needed in terms of investment; it is not just a question of sending a staff member on a two-day course.

The following response was typical of many:

"Core funding 'advocacy skills' and having capability to sustain funding to develop skills is not 'fundable' via many funding arrangements. Except for organisations like Friends of the Earth (who are established primarily to lobby) supporters/funders tend to like to see things happening on the ground rather than funding 'nebulous concepts' such as policy that lack clear outcomes."

• LACK OF TIME. Allied to the lack of resources was a widely perceived lack of time. A sense of desperation comes across from some of the responses, a feeling that CSOs are so busy trying to deliver on outcomes they have committed themselves to that they have no time to spend on thinking about the larger picture or long-term development. The following quote captures this well:

"Time pressures and the desire/expectation to be getting on with something practical in the here and now, rather than dedicating time and resources to more strategic/thorough methods. Funding pressures often mean organisations have to 'produce' something in a given time period, so the more long-term acquiring of skills/general political analysis can be difficult to incorporate into work plans."

There was a strong feeling with responses around this theme that the sector as a whole is failing to weigh up its needs going forward, because of this preoccupation with day-to-day survival.

"Day to day pressure of running organisations and campaigns and not enough time spent reflecting on what we have done and what we need to do next – ideally together."

"Lack of funding. Acquiring skills requires time. Only those organisations with enough resources can afford to do so. Project-funded organisations find it more difficult. Lack of funding also pushes organisations back to their 'core business' and [they] are less likely to explore new territory/skills or reach out to other organisations. Which is actually what needs to happen (better coordination and more thinking out of the box in order to respond to current challenges)."

• LOW SALARIES IN THE SECTOR. There were many references to the low salaries that are paid in the environmental non-profit sector, and the fact that this is a barrier to attracting high-calibre individuals with the skill-sets that are needed. Respondents referred to an ethos of low pay that results in part from the large amount of volunteering in the sector. Some felt that this problem is compounded by the fact that individuals with the skill-sets needed to increase the effectiveness of the sector are not naturally drawn to working in it (regardless of compensation issues). One respondent commented that:

"The environmental sector often tends to employ practitioners (field biologists and conservationists), which is needed for on the ground implementation but for environmental activities to be successful in the real world, environmental organisations need to diversify their skill-set to be able to translate their messages to the appropriate audiences and make activities relevant to the real world."

B) TRIED AND TESTED APPROACHES

- INNOVATION AND BREAKING THE MOULD. In addition to recognising the practical constraints for organisations that want to acquire new skill-sets, many chief executives made critical comments about the sector's lack of willingness to move away from its tried and tested approaches, and to embrace new ideas. The following quotes gives a good sense of the overall tone of responses:

"Many are locked into a particular approach by past history, charitable objectives or existing skills – breaking out from these requires more expertise in change management than is usually the case in environmental organisations."

"Big question! We'd like to understand this more ourselves. Our current impression is that it's largely down to senior management, particularly in the larger NGOs … Senior Management Teams seem to be particularly risk-averse and conservative regarding new approaches and alternative theories of change. Whether this is nature (self-selecting) or nurture (pressures of the job) we're not sure."

- ECONOMICS CAPACITY. A reluctance to engage in discussion of the economic dimension of environmental issues was highlighted as a particular problem for the sector, and this is borne out in Chart 13 in Section 9, where *economics and/or financial expertise* is identified as the skill-set that the sector most needs to acquire. One respondent commented:

"[Environment groups are] less familiar/ comfortable with arguing the economic case rather than environment. Too nervous to get it wrong in public so choosing not to enter the debate."

- TACTICS NOT STRATEGY. More broadly there was criticism of the sector for being focused too much on specific environmental problems and not enough the changes needed to resolve them. The challenges are borne out in the following quote:

"Focus on the problem, rather than the change in the power dynamics needed to deliver the solution. The larger environmental NGOs are falling behind young start ups' social media and entrepreneurial expertise."

There was also a perception that the sector is not good at transferring expertise and knowledge internally, and that it lacks structures for mentoring and coaching. This concern links to the wider question of how collaboration could be enhanced within the sector. A lot of responses to the question about barriers to acquiring new skills pointed towards the need for better collaboration, and reflected a concern about how skills are currently distributed, rather than focusing on the ability or willingness of individual organisations to acquire new skills.

WHAT ARE THE IMPLICATIONS?

The 'hamster wheel' nature of life in the sector is abundantly clear from the quotes above, with FUNDERS contributing to the problems by failing to provide core funding or patient capital, and contributing to a short-term outlook through the metrics used to evaluate grants. This undoubtedly hampers INNOVATION, a problem compounded by a lack of expertise in change processes, and a rather risk-averse culture. Could CSOs and their funders COLLABORATE to address these problems?

A foundation perspective

In order to explore foundation perspectives on the sector, members of EFN were asked the following question: "*Other than additional resources, what are the three changes (in focus, tactics, messaging etc.) that would do most to make the environmental sector more effective?*" There was strong alignment in the responses, with a few key themes standing out. Interestingly these are different from the perspectives coming from chief executives within the sector.

The top change that the foundations feel is needed is an improvement in the way in which the sector communicates, in the form of more effective framing and messaging. Concerns about current practice included the following: i) organisations are speaking mainly to 'the converted'; ii) there's a need to talk more about people and less about the planet; iii) more positive and visionary messages are needed, along with more consistency; and iv) the sector is still too attached to 'hair-shirt puritanism', 'beards and sandals' etc. The strength of feeling with which this last view was expressed surprised us, with foundations making comments like "Give up on trying to replace capitalism with warmed-up 1960s nonsense", and "Focus on supporting modern society rather than a nostalgic yearning for a rustic idyll which never existed."

In addition to focusing on communications and messaging, foundation staff highlighted the need for more effective collaboration within the sector, a common refrain on the part of the chief executives.

The foundation respondents also called for the sector to step up its engagement with businesses going forward. As with the communications and messaging theme this is not something that featured strongly in the responses from chief executives of the CSOs, despite the increasing importance of business income to the sector. Foundations seem to see a need for environmental organisations to have a more mainstream and partnership-oriented approach to the corporate sector, as well as focusing more on bringing about change in the business community and in finance.

16 Passionate collaboration?

Collaboration between environmental CSOs has been referred to regularly in this report, in relation to the potential for harnessing the power of larger membership organisations, for increasing the focus on systemic and poorly-resourced thematic issues, as an attribute of effective environmental organisations, and as something which some respondents see as a strength of the sector at the moment. Appendix E includes some of the many text responses that touched on the need to improve collaboration.

It is not difficult to think of examples of collaboration within the sector in recent years that have had positive outcomes. Thinking only about advocacy work we can point to a) the campaign against a third runway at Heathrow which united organisations representing two million people; b) the campaign against new coal-fired power plants in the UK, which saw international development organisations join forces with the environmental sector; c) advocacy to secure the Green Investment Bank, and before that the Big Ask! campaign leading to the Climate Change Act; d) action to stop the government's planned sell-off of the forest estate, involving online networks like 38 Degrees; and e) lobbying in relation to the government's proposals on the planning system, involving the National Trust and Daily Telegraph as well as many environmental organisations. Most of these examples involve reactive collaboration in the face of threats to the environment, but some are proactive, making the running in changing the status quo for the better.

At the same time as calling for more collaboration, the chief executives responding to the survey were very realistic about the factors that are likely to prevent it. As mentioned in Sections 12 and 14, increasing competition for scarce funding was seen as by far the biggest barrier to more collaborative working. Sensitivities about brand images, differing values and objectives between organisations, a lack of time, and a nervousness about motivation were all cited as additional barriers, as reflected in the following quotes:

"Doing strategy within an organisation is hard enough, doing it across organisations is quite hard. One of the feelings is that if we want to have greater cohesion and greater synergies and to make sure our actions are greater than the sum of our parts, we may need support to make that happen. Arguably existing networks don't do that."

"You'll get different coalitions of the willing. Different folks are more or less happy to coalesce or play together. Joint strategy only works when you've got shared values properly shared. Trying to force people to share strategy when you haven't got the same starting point doesn't work. That's why some of the coalitions we take part in end up doing tactical work rather than strategic work together."

"Question is what is limiting factor? Sometimes it's time, sometimes it's nervousness about what other organisations' real motivations might be – whether you can build trust is crucial."

We don't underestimate the challenges involved in more effective collaboration, either amongst environmental CSOs or their funders. Collaboration often requires hard work, patience, flexibility, clarity of purpose, respect, trust, and many other things besides. Yet it seems to us that many of the challenges identified by chief executives in responses to the survey lend themselves to collective reflection and discussion, potentially leading to collaborative work.

WHAT ARE THE IMPLICATIONS?

What have been the most effective examples of COLLABORATION within the UK environmental CSO sector? What were the characteristics that led to success? How can these be replicated? What can FUNDERS do differently in the future in order to support more collaboration?

Conclusions and next steps

Our intention with this initial survey was to take the pulse of the environmental non-profit sector. What have we found?

- The survey reveals a sector full of committed and professional environmentalists, with real strengths in terms of public trust, engaged volunteers and supporters, integrity, expertise, and passion. Leaders within the sector have a keen sense of the challenges that it faces in coming years.

- Funding is at the forefront of these challenges – both reductions in overall funding levels and changes in the nature and source of funding. There are undoubtedly ways in which both philanthropic and non-philanthropic funders could modify their grant-making practice so as to provide better support to the sector, and we plan to publish a separate short report summarising comments and suggestions from the survey in order to encourage debate.

- Resource allocation. The survey shows that the sector's resources are primarily focused on a 'traditional' environmental agenda within the UK, often delivered at a local level, and on mainstream discourses of environmentalism, despite the recognition by chief executives of the need to grapple with more systemic challenges, with global shifts in power, demographic changes etc. Cutbacks in funding focus attention on the question of whether the sector is too fragmented and whether consolidation would be beneficial. How can the sector best have a conversation with itself, and its funders, about current and future resource allocation, specialisation, and resilience?

- Skill-sets and tools. The survey identifies a number of skill-sets and tools where additional support from funders might be beneficial. These include a) economics and financial expertise; b) leadership and organisational planning; c) political lobbying expertise; d) strategic communications capacity, in terms of public opinion polling and framing; e) 'horizon-scanning' capacity; and f) training in systems thinking and systemic analysis.

- Innovation and breaking the mould. There is a clear tension between, on the one hand, a recognition of the need for changes in approach, to engage new constituencies, embrace social media, work from the bottom up, re-frame messaging; and on the other hand, the reality of life on the 'hamster wheel' day to day, with no resources with which to experiment and a sense of risk-aversion plus reliance on a core play-book of approaches combined with an ever stronger evidence-base. How can funders work together with leaders in the sector to provide the time and space for joint reflection, plus resources that allow for risk-taking and innovation?

- Collaboration. Running through the responses to the survey is the question of how to promote more effective collaboration. Some see collaboration as a strength of the sector already, many agree it is an important attribute of the most effective organisations, and others fear for future collaboration in the context of falling income. It is clear that there are opportunities for collaboration going forward, on the part of both CSOs and their funders, and also between these two constituencies. How can this best be achieved?

We pose the questions at the end of these paragraphs and elsewhere in the report in the hope that leaders in environmental CSOs and within the funding community will pick them up, and will come up with suggestions about how to address them. Please contact us and let us know what your reactions are, and how you think the debate can best be moved forwards: pulse@greenfunders.org.

APPENDIX A:
Survey questions

Instructions/rubric for respondents have been omitted in order to save space

1 Please tell us your name, and the name of your organisation.

2 What was your organisation's a) total income, and b) total expenditure, for your last full financial year?

3 What was the a) start date, and b) end date, of that financial year, to the nearest month?

4 Please estimate what percentage of your organisation's funding in the last year came from each of the following sources.

- *Grants or donations from trusts, foundations, or charities*
- *Grants or donations from central government departments, and/or EU sources*
- *Grants or donations from local authorities*
- *Grants or donations from Lottery distributors (Big Lottery Fund and Heritage Lottery Fund)*
- *Grants or donations from businesses*
- *Other grants*
- *Membership fees and dues*
- *Donations from individuals*
- *Legacies*
- *Sales to members of the public (e.g. publications, merchandising, entrance fees)*
- *Contracts or other arrangements with businesses (e.g. for consultancy or service provision)*
- *Contracts or other arrangements with the public sector (e.g. local authorities, Defra)*
- *Contracts or other arrangements with trusts, foundations, or charities*
- *Investment income*
- *Other sources*

5 How have the sources from which your organisation gets its income changed, if at all, over the last three years?

6 Are there any a) thematic issues, or b) approaches to environmental work, for which you have found it particularly difficult to secure funding?

7 Looking forward over the next one to three years, what are the 'just around the river-bend' challenges that you think environmental groups and funders are not paying sufficient attention to?

8 The advantages of philanthropic funding, compared to other forms of income for my organisation, are...

9 How many members/supporters does your organisation have who contribute either money or time on a regular basis? Please exclude Facebook followers, or those who clicked on a petition just once.

10 How many full-time equivalent (FTE) staff work on environmental issues for your organisation?

11 Please provide an estimate (in percentages) of how your organisation's expenditure in your last full financial year breaks down between the following 12 thematic issue categories.

- *Agriculture and food*
- *Biodiversity and species conservation*
- *Climate and atmosphere*
- *Coastal and marine ecosystems*
- *Consumption and waste*
- *Energy*
- *Fresh water*
- *Sustainable communities*
- *Terrestrial ecosystems and land use*
- *Toxics and pollution*
- *Trade and finance*
- *Transport*

12 How, if at all, do you expect this breakdown to change over the next three years?

13 Please provide an estimate (in percentages) of how your organisation's work or effort breaks down between the following approaches.

- *Awareness-raising around specific issues (e.g. through the media, Internet, leaflets etc.)*
- *Environmental education (e.g. teaching children, developing curriculum materials or websites, training professionals)*

- *Public behaviour change campaigns targeted at specific individual behaviours (e.g. in relation to food, or energy, or waste)*
- *Programmes that aim to shift values and social norms (e.g. re-thinking concepts like well-being and progress, or raising moral and spiritual questions)*
- *Advocacy (e.g. engaging with decision-makers to influence public policy)*
- *Litigation directed at either government or corporations*
- *Activism directed at either government or corporations (e.g. direct action, demonstrations and picketing, boycotts, brand attacks etc)*
- *Collaborative work with businesses to change their behaviour (e.g. providing accreditation, certification, labelling or monitoring)*
- *Provision of research and expert advice (e.g. scientific research, or policy analysis)*
- *Species-specific conservation work (e.g. conservation science, breeding programmes, species re-introduction)*
- *Sustainable land management (including habitat restoration, land purchase, engagement with land managers, landscape scale conservation)*
- *Providing amenities such as access to urban green space or the countryside*
- *Community-focused service provision (e.g. energy efficiency advice, farmers' markets)*
- *Civil society coordination, coalition-building and capacity raising (e.g. supporting civil society networks, providing training)*
- *Funding (e.g. awarding grants to other organisations)*
- *Other activities*

14 Please provide an estimate (in percentages) of how your organisation's expenditure in your last full financial year breaks down between these different geographical levels.

- *Locally (within a particular community or communities)*
- *Regionally (over a county or multiple counties)*
- *Nationally*
- *European Union institutions/level*
- *Internationally (in one or more multiple countries outside the UK)*
- *Global institutions (e.g. United Nations, OECD, World Trade Organisation)*
- *Other*

15 Into which of the approaches below do you think UK environmental groups (not necessarily yours) should invest more money? i.e. which do you think have the most potential to increase the effectiveness of the sector as a whole? Please rank up to five in order of importance, using 1 to indicate your top priority.

- *Awareness-raising around specific issues (e.g. through the media, Internet, leaflets etc.)*
- *Environmental education (e.g. teaching children, developing curriculum materials or websites, training professionals)*
- *Public behaviour change campaigns targeted at specific individual behaviours (e.g. in relation to food, or energy, or waste)*
- *Programmes that aim to shift values and social norms (e.g. re-thinking concepts like well-being and progress, or raising moral and spiritual questions)*
- *Advocacy (e.g. engaging with decision-makers to influence public policy)*
- *Litigation directed at either government or corporations*
- *Activism directed at either government or corporations (e.g. direct action, demonstrations and picketing, boycotts, brand attacks etc)*
- *Collaborative work with businesses to change their behaviour (e.g. providing accreditation, certification, labelling or monitoring)*
- *Provision of research and expert advice (e.g. scientific research, or policy analysis)*
- *Species-specific conservation work (e.g. conservation science, breeding programmes, species re-introduction)*
- *Sustainable land management (including habitat restoration, land purchase, engagement with land managers, landscape scale conservation)*
- *Providing amenities such as access to urban green space or the countryside*

- *Community-focused service provision (e.g. energy efficiency advice, farmers' markets)*
- *Civil society coordination, coalition-building and capacity raising (e.g. supporting civil society networks, providing training)*
- *Funding (e.g. awarding grants to other organisations)*
- *Other activities*

16 Which of the following skill-sets do you think UK environmental groups most need to invest in over the next few years? Please rank up to five in order of importance, using 1 to indicate the most important.

- *Economics and/or financial expertise*
- *Political lobbying expertise*
- *Legal expertise*
- *Environmental science expertise*
- *Public opinion polling, strategic communications and framing expertise (including sociological and psychological expertise)*
- *Social media expertise*
- *Understanding of decision-making processes within large companies*
- *Leadership and organisational planning*
- *Social enterprise and/or entrepreneurial expertise*
- *Project management expertise*
- *Other*

17 What is stopping UK environmental organisations from acquiring the skill-sets that you identified as most important in the previous question?

18 "Working through the existing political system will deliver the environmental outcomes society needs." To what extent do you agree or disagree with this statement? (Scale of 0 to 10 provided).

19 "Non-violent direct action has an essential role to play in addressing environmental challenges even though defenders of the status quo may use it to try and discredit the sector." To what extent do you agree or disagree with this statement? (Scale of 0 to 10 provided).

20 "It is acceptable for environmental groups to take money from corporations whose activities cause significant environmental impacts (e.g. mining companies, fossil fuel companies, airlines etc)." To what extent do you agree or disagree with this statement? (Scale of 0 to 10 provided).

21 "Environmental groups should put more resources into trying to redefine economic growth and 'progress' and less into working within the current status quo." To what extent do you agree or disagree with this statement? (Scale of 0 to 10 provided).

22 "Environmental groups are more likely to succeed in changing public behaviour by appealing to intrinsic values (e.g. a sense of community, self-development, appreciation of nature) than extrinsic values (e.g. financial returns, popularity, image)." To what extent do you agree or disagree with this statement? (Scale of 0 to 10 provided).

23 Which non-profit UK environmental organisations (not including your own) do you think accomplish the most, given the resources at their disposal? Please name up to three.

24 Why do you think the organisations named in the previous question are effective?

25 What do you feel are the biggest challenges facing the sector over the next three to five years?

26 What do you feel are the biggest opportunities for the sector over the next three to five years?

27 What are the environmental sector's greatest strengths?

28 Are there any other observations or comments that you would like to make?

APPENDIX B:
Environmental organisations responding to the survey

Environmental organisations that responded to the survey, in alphabetical order. A total of 140 organisations took part, and we salute them for their help with this research.

10:10
A Rocha International
Amphibian and Reptile Conservation Trust
Aspinall Foundation, The
Aviation Environment Federation
Avon Wildlife Trust
Awel Aman Tawe
Bankside Open Spaces Trust
Bat Conservation Trust
Berks, Bucks and Oxon Wildlife Trust
Biofuelwatch
BioRegional
BirdLife International
Black Environment Network
Borders Forest Trust
Bradford Community Environment Project
British Trust for Ornithology
Buglife
Butterfly Conservation
CAFOD
Cambridge Carbon Footprint
Campaign for Better Transport
Campaign to Protect Rural England
Capacity Global
Cape Farewell
Carbon Disclosure Project
Carbon Tracker
Carplus
Centre for Alternative Technology
Centre for Sustainable Energy
CHEM Trust (Chemicals, Health & Environment Monitoring Trust)
China Dialogue
Christian Aid
ClientEarth
Climate Group, The
Climate Outreach Information Network
Compassion in World Farming
Corporate Watch
Derbyshire Wildlife Trust
E3G – Third Generation Environmentalism
Earthwatch Institute
EcoNexus
Eden Project, The
Elephant Family
Environmental Investigation Agency
FARM Africa
Fauna & Flora International
FERN
Food Ethics Council
Forest Peoples Programme
Forest Trust, The
Forum for the Future
Freshwater Biological Association
Friends of the Earth (EWNI)
Friends of the Lake District
Froglife Trust, The
Gaia Foundation, The
Garden Organic
GeneWatch UK
Global Action Plan
Global Canopy Programme
Global Legislators Organisation (GLOBE), The
Global Witness
Gloucestershire Wildlife Trust
GM Freeze
Green Alliance
Greenpeace UK
Groundwork South Tyneside & Newcastle
Groundwork
Hampshire & Isle of Wight Wildlife Trust
Hebridean Whale and Dolphin Trust
Institute for European Environmental Policy
International Institute for Environment & Development
John Muir Trust
Keep Britain Tidy
Kew Foundation
Kyoto2
Landscape Institute
Latin American Mining Monitoring Programme
London Community Resource Network
London Cycling Campaign
Lydd Airport Action Group
Marine Conservation Society
Marine Stewardship Council, The
MERCi (Manchester Environmental Resource Centre initiative)
National Biodiversity Network Trust
National Energy Action
Natural History Museum

New Economics Foundation
No2NuclearPower
Northumberland Wildlife Trust
Operation Noah
Organic Research Centre
Pennine Prospects
Permaculture Association
Pesticide Action Network UK
Peterborough Environment City Trust
Planning Democracy
Plantlife International
PLATFORM
Policy Exchange
Pond Conservation
Population Matters
Public Interest Research Centre
Rainforest Foundation UK
Royal Parks Foundation
RSPB
Sandbag Climate Campaign
Save the Rhino International
Scottish Environment LINK
Severn Wye Energy Agency
ShareAction
Slow Food UK
Small Woods Association
Soil Association, The
Somerset Wildlife Trust
Staffordshire Wildlife Trust
Stop Climate Chaos Coalition
Surfers Against Sewage
Surrey Wildlife Trust
Sustain: the alliance for better food and farming
The Wildlife Trusts
Tourism Concern
Transition Network
Tree Aid
UKCEED (UK Centre for Economic and Environmental Development)
UK Environmental Law Association
UK Tar Sands Network
United Kingdom Without Incineration Network
Wildfowl & Wetlands Trust, The
Wildlife Trust for Bedfordshire, Cambridgeshire and Northamptonshire
Wildlife Trust for Sheffield and Rotherham
Women’s Environmental Network
Woodland Trust, The
World Development Movement
World Land Trust
WWF UK
Wye and Usk Foundation, The
Yorkshire Wildlife Trust
Zoological Society of London

APPENDIX C:
Thematic issue categories

1 AGRICULTURE AND FOOD – a very broad category. It includes: support for organic and other forms of sustainable farming; training and research to help farmers in developing countries; campaigns relating to the control of the food chain; initiatives opposed to factory farming; horticultural organisations and projects; education on agriculture for children and adults (e.g. city farms); opposition to the use of genetically modified crops and food irradiation; work on food safety and on the genetic diversity of agriculture (including seed banks); and soil conservation.

2 BIODIVERSITY AND SPECIES PRESERVATION – again a broad category, focused on work that protects particular species, be they plant or animal, vertebrate or invertebrate. Included within this is support for botanic gardens and arboretums; academic research on botany and zoology; the protection of birds and their habitats; funding for marine wildlife such as whales, dolphins and sharks; projects that aim to protect endangered species such as rhinos and elephants; and defence of globally important biodiversity hotspots, including the use of refuges, reserves and other habitat conservation projects; and wildlife trusts.

3 CLIMATE AND ATMOSPHERE – the bulk of the money in this category is targeted towards work on climate change, with a much smaller sum directed towards the issue of ozone depletion. Also included: work on acid rain, air pollution and local air quality.

4 COASTAL AND MARINE ECOSYSTEMS – this category includes support for work on fisheries; aquaculture; coastal lands and estuaries; marine protected areas; and marine pollution (such as marine dumping).

5 CONSUMPTION AND WASTE – this category covers work directed at reducing consumption levels; initiatives that look to redefine economic growth; projects on waste reduction, sustainable design and sustainable production; recycling and composting schemes; and all aspects of waste disposal, including incinerators and landfills.

6 ENERGY – this category covers alternative and renewable energy sources; energy efficiency and conservation; work around fossil fuels; hydroelectric schemes; the oil and gas industries; and nuclear power.

7 FRESH WATER – this category covers all work relating to lakes and rivers; canals and other inland water systems; issues of groundwater contamination and water conservation; and projects relating to wetlands.

8 SUSTAINABLE COMMUNITIES – this category covers urban green spaces and parks; community gardens; built environment projects; and community-based sustainability work.

9 TERRESTRIAL ECOSYSTEMS AND LAND USE – as with 'agriculture' and 'biodiversity', this is a broad category encompassing land purchases and stewardship; national or regional parks; landscape restoration and landscape scale conservation efforts; work on land use planning; tree planting, forestry, and work directed to stopping deforestation; and the impacts of mining.

10 TOXICS AND POLLUTION – this category covers all the main categories of toxics impacting on the environment and human health: hazardous waste; heavy metals; pesticides; herbicides; radioactive wastes; Persistent Organic Pollutants; household chemicals; other industrial pollutants; and noise pollution.

11 TRADE AND FINANCE – the trade and finance category encompasses work on corporate-led globalisation and international trade policy; efforts to reform public financial institutions (such as the World Bank, International Monetary Fund, and Export Credit Agencies); similar work directed at the lending policies of private sector banks; initiatives around the reduction of developing country debt; and local economic development projects and economic re-localisation.

12 TRANSPORT – this category includes all aspects of transportation, including public transport systems; transport planning; policy on aviation; freight; road-building; shipping; alternatives to car use plus initiatives like car pools and car clubs; the promotion of cycling and walking; and work on vehicle fuel economy.

APPENDIX D:
Environmental organisations accomplishing the most, relative to resources at their disposal

The table below shows all the environmental CSOs that were named in response to the question 'Which non-profit UK environmental organisations (not including your own) do you think accomplish the most, given the resources at their disposal?' Organisations marked with an asterisk are grant-making foundations rather than operating charities.

Environmental CSO	No. of mentions
Greenpeace UK	32
Friends of the Earth (EWNI)	20
RSPB	20
WWF UK	10
The National Trust	9
Buglife	8
Butterfly Conservation	8
ClientEarth	8
Wildlife Trusts, The	8
Marine Conservation Society	6
Green Alliance	5
Sustrans	5
Woodland Trust, The	5
Environmental Investigation Agency	4
FERN	4
Global Witness	4
38 Degrees	3
E3G – Third Generation Environmentalism	3
Fauna & Flora International	3
Forum for the Future	3
Groundwork	3
New Economics Foundation	3
Soil Association, The	3
Wildfowl & Wetlands Trust, The	3
Wildlife & Countryside Link	3
Badger Trust	2
British Trust for Ornithology	2
Campaign to Protect Rural England	2
Carbon Tracker	2
Eden Project, The	2
Federation of City Farms & Community Gardens	2
Forest Peoples Programme	2
Frack Off	2
Friends of the Earth Scotland	2
Jubilee Debt Campaign	2
People & Planet	2
Permaculture Association	2
Plantlife	2
PLATFORM	2
Population Matters	2
Public Interest Research Centre	2
Radiation Free Lakeland	2
Sustain: the alliance for better food and farming	2
Transition Network	2
UK Tar Sands Network	2
War on Want	2
10:10	1
Action for Happiness	1
Aldersgate Group, The	1
Ashden Trust, The*	1
Aviation Environment Federation	1
Bat Conservation Trust	1
Biofuelwatch	1
BioRegional	1
BLUE Foundation*	1
Born Free Foundation	1
Botanical Society of the British Isles	1
Breast Cancer UK	1
British Ecological Society	1
Bumblebee Trust	1
Campaign Against Arms Trade	1
Campaign for Better Transport	1
Campaign for Real Recycling, The	1
Centre for Sustainable Energy	1
Civic Voice	1
Climate Bonds Initiative	1

Environmental CSO	No. of mentions
Climate Group, The	1
Climate Justice Collective	1
Coal Action Scotland	1
Community Energy Scotland	1
Compassion in World Farming	1
Conservation Volunteers, The	1
Creekside Discovery Centre	1
Econexus	1
Elephant Family	1
Environmental Justice Foundation	1
European Environmental Paper Network	1
Fairtrade Foundation, The	1
FARM Africa	1
Fish Fight	1
Fishing for Litter	1
Food Climate Research Network	1
Food Ethics Council	1
Freegle	1
Friends of Brede Valley	1
Froglife Trust, The	1
Fuel Poverty Action	1
Garden Organic	1

Environmental CSO	No. of mentions
GM Freeze	1
Growing Communities	1
International Institute for Environment & Development	1
Joseph Rowntree Charitable Trust*	1
Joseph Rowntree Reform Trust*	1
Joseph Rowntree Foundation*	1
Julie’s Bicycle	1
Kindling Trust, The	1
Land Trust, The	1
Landlife	1
Learning through Landscapes	1
London Cycling Campaign	1
London Mining Network	1
Low Level Radiation Campaign	1
Marine Conservation Society (Scottish arm)	1
Marine Stewardship Council	1
No Dash For Gas	1
Oxfam	1
Pond Conservation	1
Positive Money	1
Project Dirt	1

Environmental CSO	No. of mentions
Regen SW	1
Resurgence & Ecologist	1
RSPB (Scotland)	1
Sandbag	1
Seeds for Change	1
ShareAction	1
Sharenergy	1
Sigrid Rausing Trust*	1
Size of Wales	1
Stop Climate Chaos Scotland	1
Surfers Against Sewage	1
Tear Fund	1
Town & Country Planning Association	1
Transform Scotland	1
UK Feminista	1
UK Food Sovereignty Movement	1
Water Aid	1
Women’s Environmental Network	1
World Development Movement	1
World Resources Institute	1
Zoological Society of London	1

APPENDIX E:
On the need for collaboration

"Limited resources and single-expertise organisational models lead to a 'silo' effect, and inefficient pairing of capacities between NGOs working in similar programme areas (due to differences in approach, leadership personalities, or funding relationships) continues to generate systemic weakness."

"NGOs with less funding are less likely to work with others – but that's the only way to be more effective."

"… The environmental movement needs to start lining up its ducks, in the same way that Big Oil is; and avoiding abstruse demarcation disputes amongst ourselves."

"Difficulty of achieving coordinated strategic advocacy (and other activity) given the huge number and range of organisations."

"Lack of cash and not enough joined-up work – need more collaboration."

"Lack of cooperation and collaboration resulting in competition within the sector. Competition for funding – specifically related to social causes."

"Lack of focus, in-fighting and competition for scarce resources."

"No money; competition, not collaboration."

"Keeping your nerve in face of harsh treatment by stressed-out public sector, and competition for scarce resources. Moving with the times while staying true to aims. Sharing knowledge and partnership."

"… The public will want organisations with similar objectives to work together/in partnership to maximise each donation."

"The biggest internal challenges for the sector are: risk of fragmentation of the work of different and competing organisations; failure to reach critical mass due to lack of coordination; lack of access to sufficient funding."

"Stronger partnership and collaboration across the sector and across sectors."

"Coalition building within the NGO sector – collaboration will be a strong opponent for big business."

Designed by: Peter Bishop (peter.bishop@tourismconcern.org.uk)

Printed by: Severnprint (www.severnprint.co.uk) on 100% recycled paper using renewable energy.

www.greenfunders.org