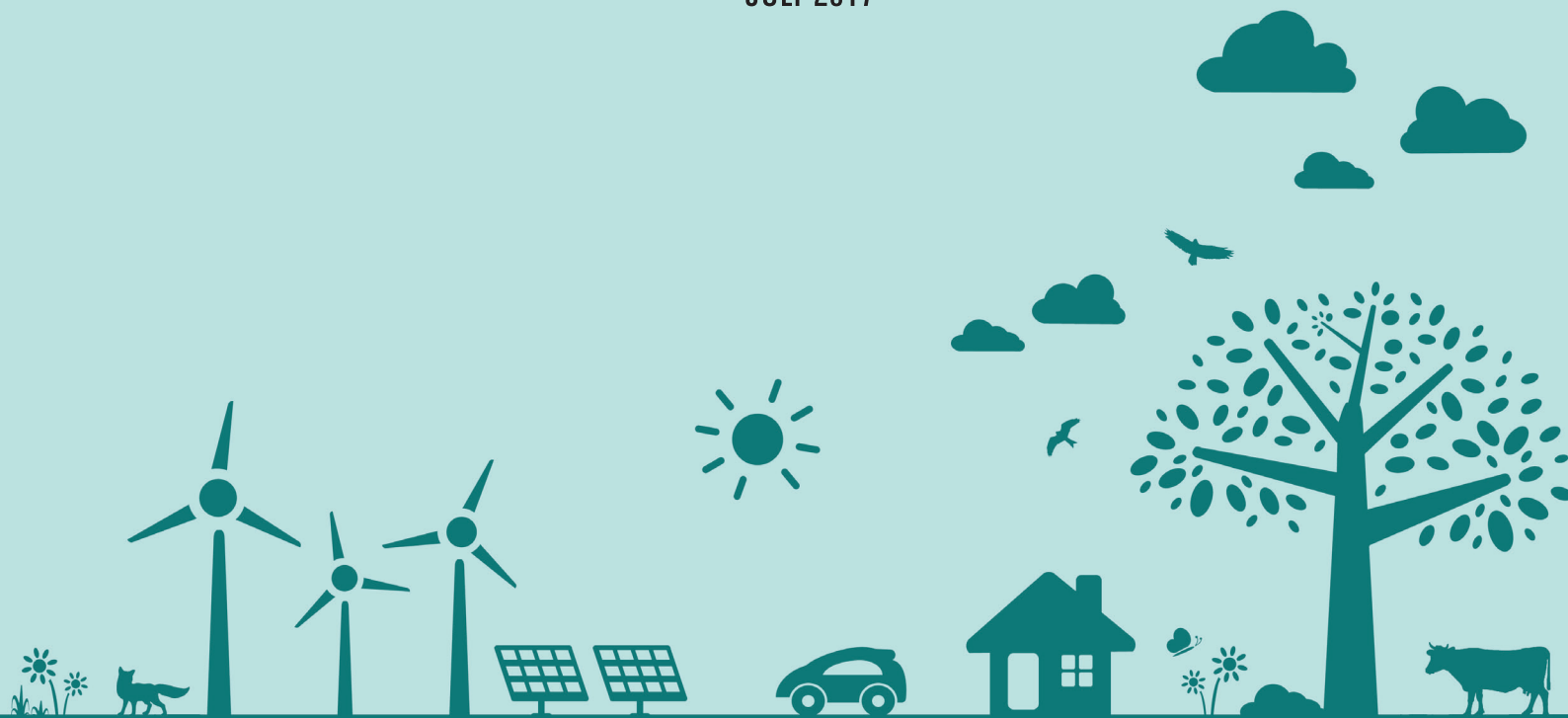


**Florence Miller, Jon Cracknell
and Harriet Williams**

WHAT THE GREEN GROUPS SAID

**Insights from the UK
Environment Sector**

JULY 2017



Environmental
Funders Network

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Stephen Pittam (trustee of the Global Greengrants Fund UK), Steph Stares (Waterloo Foundation) and Harriet Williams (Goldsmith Family Philanthropy).

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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.

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.

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 EFN's director, Florence Miller, using the contact form at www.greenfunders.org.

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.

Executive Summary

Chief executives of 92 UK environmental groups (CSOs¹) responded to the Environmental Funders Network's second 'pulse-taking' survey of the sector. Many of the survey questions were identical to those that we asked in 2013, and 72 organisations responded to both surveys. We asked organisational leaders to reflect on success, failure, the external context for their work and what they think is required for the sector to be more effective. In addition, we asked them to break down their income by source and their expenditure in terms of thematic focus, geography and the approaches that their organisations use. The results reveal a diverse sector in which there is a good degree of consensus regarding how to increase impact, coupled with persistent concern about the slow speed with which change is being achieved.

'We asked organisational leaders to reflect on success, failure, the external context for their work and what they think is required for the sector to be more effective'

92
UK GROUPS
SURVEYED

£1 billion
COMBINED
INCOME

£981m
COMBINED
EXPENDITURE

Income and expenditure

Income

The combined environment-related income of the 92 CSOs responding to the survey amounted to over £1 billion². For the 72 organisations that responded to this survey and the 2013 version, environmental income had increased in real terms by 15.7 per cent, but a different, longer-term dataset tracked by EFN indicates that, when combined, the real income levels for 110 UK environmental organisations were lower in 2015 than in 2011.

Membership fees, sales to the public, donations from individuals and legacies accounted for almost 60 per cent of the income of CSOs taking part in the survey. UK central government grants have dropped in importance since the 2013 survey, with both business and public sector contracts becoming more important.

Foundation grants are spread widely and thinly: though they provided only 7.1 per cent of total income, 84 out of the 92 organisations received foundation funding. Smaller CSOs tended to be much more reliant on trust and foundation funding.

Organisations are concerned about the effect Brexit will have on their income. They anticipate losing at least

4.8 per cent of their combined income as a result of Britain leaving the EU, due to the loss of grants and subsidies, and the possible impact of Brexit on the wider UK economy.

Expenditure

The combined expenditure of the 92 CSOs amounted to nearly £981 million. Over half of this was directed towards *biodiversity and species preservation* or *terrestrial ecosystems conservation*. Work focused on *climate change*, *energy* and *transport* received less than 10 per cent of these funds; total expenditure on these issues has fallen by 16 per cent since the last survey in 2013.

The most widely used approaches are *awareness raising*, *advocacy* and the provision of *research and expertise*, but the largest shares of expenditure are directed to *sustainable land management*, *species-based conservation* and *providing access to nature*, with these three approaches accounting for 44 per cent of expenditure.

Geographically, the largest proportion of expenditure was on work at the local level.

Successes and failures

Individual organisations' achievements and opportunities to strengthen the sector

Asked about their achievements over the past few years, organisations described positive policy outcomes (the 5p carrier bag charge, the EU's illegal timber regulation, the microbeads ban), damaging policies held back or defeated (the forests sell-off, rapid expansion of fracking), improvements to local environments (city nature reserves, meadow restorations) and the establishment of global environmental frameworks (the Paris climate deal).

Sector's successes

Many of the responses regarding the sector's recent successes related to climate and energy (the Climate Change Act and subsequent carbon budgets, the Paris Agreement, prevention of fracking to date) and conservation wins (marine conservation zones established, EU nature directives protected).

Sector's failures

Topping the list of failures was the lack of discussion of environmental issues during the EU referendum, followed by renewable energy setbacks, concern that support for

action on climate change is waning, and ongoing biodiversity loss. Some issues – renewables, fracking, air pollution – appeared in both the top successes and failures lists, with significant wins balanced by continued threats.

Most effective environmental NGOs

ClientEarth, the RSPB and Greenpeace were ranked as the most effective environmental organisations, relative to their resources, by their peers.

Characteristics of successful groups

The most effective environmental CSOs were most commonly described as having a clear focus, an emphasis on policy work and a collaborative approach to their work.

Greatest champions of environmental issues

Respondents named Caroline Lucas MP and Sir David Attenborough as the individuals who have done the most to advance the UK environmental agenda over the last three years. Chris Packham, Tony Juniper and George Monbiot followed.

TO BECOME MORE EFFECTIVE, THE SECTOR'S LEADERS FEEL THEY NEED:

SKILL SETS

investment in
i) behavioural science, strategic communications and framing expertise;
ii) economics and financial expertise; and
iii) political lobbying expertise.

APPROACHES

i) more and better advocacy work;
ii) increased movement building and grassroots mobilisation; and
iii) stronger communications, with a greater focus on attitudes, behaviours and values.

COLLABORATION

better strategising and scenario planning across organisations, as well as collaborative efforts to deliver practical communications, campaigns and advocacy.

RESOURCES

unrestricted core funding, along with longer-term support.

ORGANISATIONAL CULTURE CHANGE

increased capacity for self-reflection, to ensure organisations are flexible and responsive in the face of unexpected developments, and open to new ways of accomplishing their objectives.

¹ Throughout this report we use the abbreviation CSO (civil society organisation) to refer to the non-profit environmental organisations that took part in the survey.

² Most CSOs were reporting on income and expenditure in calendar year 2015 or the standard 2015/16 UK tax year.

Context for environmental work

Brexit

The survey portrays a sector that is deeply troubled by the EU referendum result, given widespread agreement that membership of the EU has been beneficial for the UK's environment. Respondents were frustrated by the sector's limited role in the referendum campaign, attributing this in part to complacency and in part to recent changes in charity regulation.

Two-thirds of respondents are adjusting their work in order to respond to Brexit. The risk that regulatory standards may be lowered in the future is a major concern, and many respondents are undertaking advocacy work (including within the devolved administrations) to try and ensure environmental protections remain at equivalent or higher levels than the standards set by the EU.

Over a quarter of respondents are participating in collaborations related to Britain's exit from the EU. Most appear to be talking chiefly about collaboration within the environmental sector at this time, with a few notable exceptions.

'The survey portrays a sector that is deeply troubled by the EU referendum result'

66%
RESPONDING TO
BREXIT

>33%
ADVERSELY
AFFECTED BY
CLOSING SPACE
FOR CIVIL SOCIETY

Closing space for civil society

Over a third of survey respondents report that their funding, strategy or other activities have been adversely affected by the Lobbying Act, by fundraising regulations that limit activities including communications with members and supporters, or by Charity Commission guidelines that deterred environmental groups from engaging with the EU referendum campaign. Organisations working overseas also reported negative impacts from the closing of civil society space in 20 other countries, including India and China.

Key messages to funders

- To support a more strategic, responsive, innovative and collaborative sector, funders need to provide more core support with more unrestricted grants and full-cost recovery awarded to organisations over longer-term periods.

- Policy and advocacy work are key to the sector's effectiveness, are hard to fund and need more grant funding.

- The sector needs investment in communications expertise – in terms of messaging, behaviour change and connecting with people's values.

- Funders should consider using their influence and knowledge of the sector both to encourage new donors and to bring together their grantees and networks to foster collaboration across silos.

- Funders should work together to understand the combined effects of their eligibility criteria and ensure gaps are filled.

- Trusts and foundations should consider what proportion of their funding is going to organisations that particularly rely on philanthropic income versus those that do not.

KEY FINDINGS

Across the survey, we repeatedly heard calls around four main themes related to the effectiveness of the sector. There was broad agreement that the sector would benefit from more and/or stronger:

- 1 **policy and advocacy work**
- 2 **collaboration**
- 3 **communications**
- 4 **core, unrestricted and/or flexible funding**

These themes are picked out throughout the report.

Introduction and Methods

In 2013, the Environmental Funders Network (EFN) published the results of our first 'pulse-taking' survey of the leaders of UK environmental CSOs in the report *Passionate Collaboration?*. In late 2016/early 2017 we conducted a second survey, repeating many of the 2013 questions and adding new questions to investigate changes over the last three years.

We asked organisational leaders to reflect on success, failure, the external context for their work and what they think is required for the sector to be more effective. In addition, we asked them to break down their income by source, and their expenditure in terms of thematic focus, geography and the approaches that their organisations use. The full list of questions can be found in Appendix I. Our goal in conducting the survey was to create a picture of the 'demand' side of the grants market – a complement to EFN's research into the 'supply' side of the grants market that is set out in our *Where the Green Grants Went* publications.

LESSONS FROM
SUCCESS
& FAILURE

WHAT THE SECTOR
NEEDS
MOST

BREAKDOWN
OF INCOME
AND EXPENDITURE

To our knowledge, the 2013 and 2016 surveys are the only attempts that have been made to capture the collective intelligence of environmental sector leaders.

We sent the survey to 330 environmental CSOs, including the 150 largest measured by income, and 180 which we selected to try and capture the full breadth of organisations in the sector, in terms of size, issue focus and approach. There are many thousands of environmental CSOs in the UK so our group of 330 represents a fairly small sample, but it does include nearly all of the large CSOs in the sector, who between them command the vast majority of resources in terms of income, staff and volunteers.

Between September 2016 and January 2017, 92 CSOs responded to the survey. Of these, 72 CSOs had also responded to our 2013 survey, providing us with a substantial data set for like-for-like comparisons.

We are grateful to the chief executives and others who took time out of busy schedules to fill in this detailed survey. We hope the results will prove as useful and interesting to them as to funders. Most importantly, we hope they will prove to be a catalyst for the sector and its funders to come together to help increase the sector's impact going forwards.

We invite and welcome your feedback on the survey and this report at pulse@greenfunders.org.

'We wanted to create a picture of the "demand" side of the grants market — a complement to EFN's *Where the Green Grants Went* research into the "supply" side of the grants market'

1 How Environmental Groups Generate Their Income

The 92 CSOs responding to the survey had a combined income for environmental work of just over £1 billion (£1,015,248,633)³. Looking at a like-for-like comparison of the 72 CSOs taking part in both EFN surveys, we see that environmental income climbed by 15.7 per cent between 2013 and 2016, once inflation is factored in. Staff numbers seem to have been growing even faster, with growth of 19 per cent in full-time equivalent (FTE) staff between 2013 and 2016 for those CSOs where we have directly comparable data.

If, however, we look further back in time, using a separate EFN analysis of the income of a wider group of 110 UK environment CSOs over eight financial years, then we see a rather different picture, with real income growing steadily from 2008 to 2011, before falling back, to finish 7.4 per cent lower in 2015 than it had been in 2011⁴. This discrepancy is accounted for by significant increases in the income of a handful of the larger CSOs that took part in both surveys, something that was not reflected across the sector as a whole.

INCOME UP 15.7% 2013–2016
19% INCREASE IN FTE STAFF
NEARLY TWO-THIRDS EXPECT TO LOSE FUNDING DUE TO BREXIT

Which income sources are most important?

The CSOs in the survey were asked to break their income down into 18 different categories, giving us a granular understanding of income sources. The results are shown in chart 2.

For the 92 CSOs as a whole, *membership fees* and *sales to the public* are the two most important sources of income, together accounting for nearly 38 per cent of the total. When *donations from individuals* and *legacies* are added in, this figure rises to nearly 60 per cent. It is important to note that only some of the 92 CSOs benefit from these income sources. For example, fewer than a third of the CSOs made sales to the public and under half benefited from legacy income in the year in question.

On a like-for-like basis (72 CSOs), *UK central government grants* dropped in importance as an income source between 2013 and 2016, with contracts with both *businesses* and the *public sector* increasing in relative importance. This trend had begun when we surveyed chief executives in 2013.

While *foundation grants* ranked only 6th in overall importance as a source of funding (providing just 7.1 per cent of total income), they were the most widely

received income source, supporting 84 out of the 92 CSOs. In general, foundation grants are spread widely and thinly across the sector. For smaller organisations and start-ups, they are often a vital income source, whereas for the largest environmental CSOs they often account for only a small fraction of organisational income. To illustrate from this dataset: CSOs that were more than 90 per cent dependent on foundation grants had an average income of less than £550,000; whereas CSOs with an income of £50 million per year or more received on average just 3.2 per cent of their income from foundations.

The most common number of income sources across the 92 organisations was either five or six (out of the 18 categories provided). Just 10 of the CSOs received income from more than 12 different sources.

Finally, we asked respondents whether they expected their organisation to lose funding as a result of the UK's decision to leave the EU. Nearly two-thirds of respondents thought this would happen, with a total of £42.9 million thought to be at risk. This is double the amount of funding that the 92 CSOs received in the form of direct EU grants, reflecting considerable uncertainty in the sector about the wider

impacts of Brexit on areas such as agricultural subsidies and the health of the overall economy (which in turn can be expected to impact support from the public, businesses and foundations).

How have your income sources changed over the last three years?

Over a third of the respondents indicated that their income had not changed significantly in the last three years. A quarter had experienced a reduction in government funding.

IN THEIR OWN WORDS

'There has been decreasing Local Authority and statutory agency funding due to austerity measures. There has been increased competition for Lottery funding.'

'The role of philanthropy, commercial income and fixed-term competitive grants is increasing, while central government grant-in-aid is decreasing as a proportion of total income.'

'There is an increasing trend towards trusts and foundations giving project funding instead of core funding.'

CHART 2: 2016 INCOME SOURCES
 (No. of CSOs in brackets)



CHART 1: INCOME FOR 110 UK ENVIRONMENT CSOs



³ Most CSOs were reporting on income and expenditure in calendar year 2015 or the standard 2015/16 UK tax year.

⁴ This second data-set is based on information from annual accounts submitted to the Charity Commission.

2 How Environmental Groups Spend Their Income

The combined environment-related expenditure of the 92 CSOs amounted to nearly £981 million. The chart below shows that the *biodiversity and species* category completely dominates in terms of thematic focus, accounting for more than 38 per cent of the money spent. When *terrestrial ecosystems* are added in, this figure rises to more than 51 per cent. Meanwhile, the three categories most closely associated with tackling climate change – *climate and atmosphere*, *energy* and *transport* – together

accounted for less than 10 per cent of expenditure. Although more CSOs were working in the *climate and atmosphere* category than any other (49 out of the 92) it only accounted for 4.3 per cent of expenditure, a tiny share – and particularly notable given that climate and energy work dominated the sector’s successes, as described by the respondents. Other systemic drivers of environmental harm, such as *consumption and waste* and *trade and finance* also received very small shares of funding, as reported in earlier EFN research. See chart 3.

SPECIES AND TERRESTRIAL ECOSYSTEM CONSERVATION
51%
 OF EXPENDITURE

CLIMATE CHANGE ENERGY AND TRANSPORT
<10%
 OF EXPENDITURE

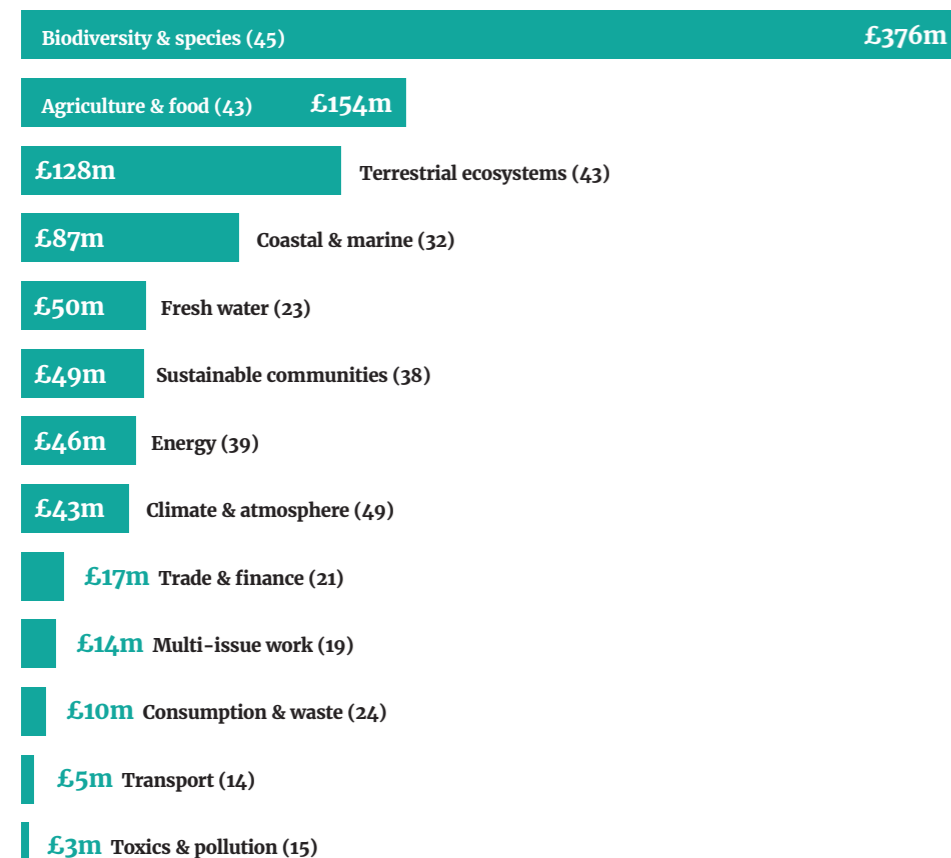
↓14%
 SINCE 2013

If we look at a like-for-like comparison of the 72 CSOs that took part in both our 2013 survey and this new one, we can see that expenditure on the three categories of *climate and atmosphere*, *energy* and *transport* fell from £80.4 million to under £69 million, a decrease of 16 per cent in real terms, without allowing for inflation.

Looking to the future, just under half the 92 CSOs taking part in the survey expected no significant change in the thematic focus of their work over the next two years. The category in which the largest number of groups expected to do more work was *coastal and marine* (eight CSOs), followed by *agriculture and food* (six) and *climate and atmosphere* (six). By contrast *energy* was the only category in which fewer groups expected to be working in two years’ time.

CHART 3: EXPENDITURE BROKEN DOWN BY THEMATIC ISSUE

(No. of CSOs in brackets)



We have broken down the 92 responding organisations’ expenditure by approach in chart 4.

While the most widely used approaches, in terms of the numbers of CSOs employing them, were *awareness raising*, *advocacy* and *research and expertise*, the largest share of funding went into *sustainable land management*, *species-based conservation* and *providing access to nature*, together accounting for more than 44 per cent of expenditure. Some 50 out of the 92 CSOs are engaged in *movement building* in some shape or form, but this

accounts for only 4.5 per cent of combined expenditure. It is notable that this is one of the approaches that most groups feel needs more investment (see section 4).

Comparing the like-for-like results from the 2013 and 2016 surveys, we see no change in the elements of the core ‘play-book’ for CSOs, with the five most widely-used approaches continuing to be *advocacy*, *awareness-raising*, *research and expertise*, *environmental education* and *movement building*.

Finally, what can we learn about where environmental

CHART 4: EXPENDITURE BROKEN DOWN BY APPROACH

(No. of CSOs in brackets)

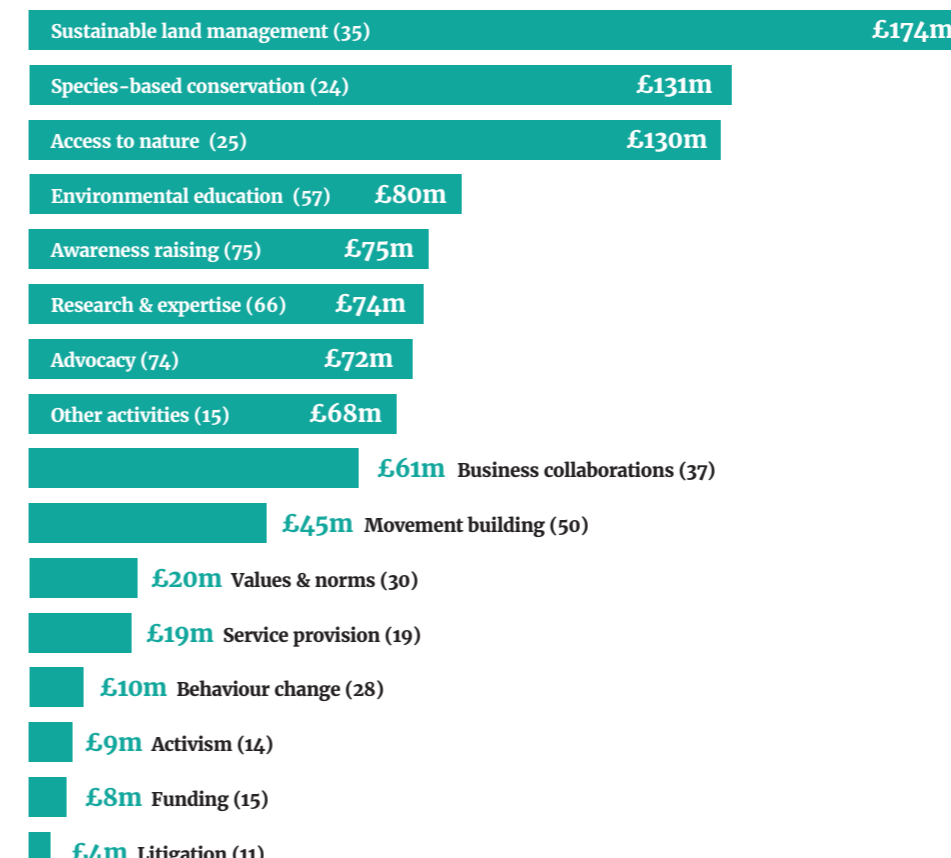
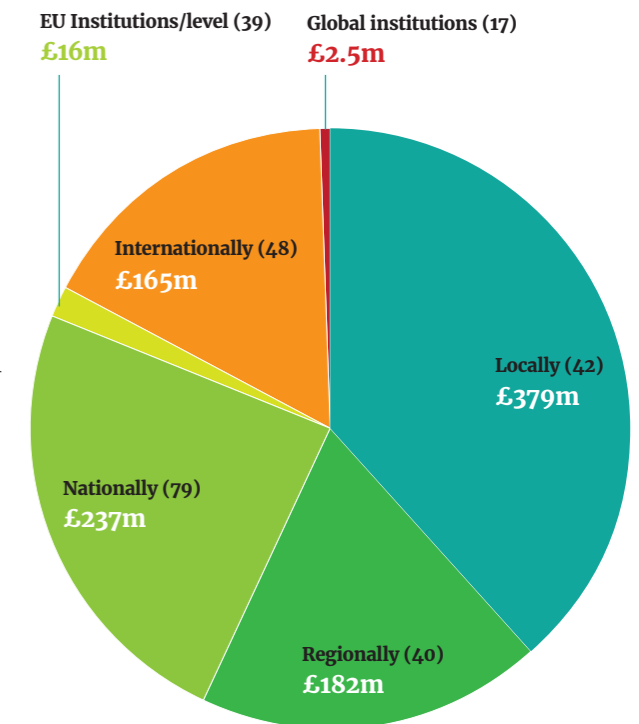


CHART 5: EXPENDITURE BROKEN DOWN BY GEOGRAPHY

(No. of CSOs in brackets)



groups are working? We asked the 92 CSOs to break their expenditure down across six geographic categories; the results are shown in chart 5.

More than £560 million (57.1 per cent of all expenditure) is being directed to work at the local or regional level. A total of 79 out of the 92 CSOs (85 per cent) are doing work at the national level, but this accounted for only 24 per cent of their expenditure. Looking at the like-for-like data from both surveys, the share of expenditure going to national work appears to have fallen, along with the (already small) share directed to EU institutions, and that supporting international work. The data suggest that the sector’s focus on local and regional activity has been increasing over the last few years.

3 Successes and Failures

We asked respondents to describe key successes and failures from the last few years, for both their own organisations and the wider sector. The results reveal a good degree of consensus regarding how to increase impact, coupled with persistent concerns about the speed with which results are being achieved.

Proudest achievements

Describing the achievements that had made them most proud, respondents put forward a powerful antidote to the idea that environmentalists are always on the losing team. Some of the achievements referred to good policies won, for instance the 5p carrier bag charge, the EU's illegal timber regulation and the microbeads ban; others to damaging policies held back or defeated,

such as the forests sell-off, or rapid expansion of fracking. Organisations also pointed to improvements in local environments, for instance city nature reserves, the restoration of meadows and extensions to national parks; and to global environmental frameworks, such as the Paris climate deal. Other successes included work engaging communities, via school solar projects, citizen science, or community energy schemes; and stakeholder work going beyond the green sector, including that with health and business interests.

Another set of responses – especially common among smaller organisations – referred to organisational development and resilience, for instance an improvement in funding position, the recruitment of volunteers or simply maintaining campaign activity on a shoestring budget.

GREATEST SUCCESSSES:
CLIMATE CHANGE ACT AND BUDGETS
MARINE CONSERVATION ZONES
PARIS AGREEMENT

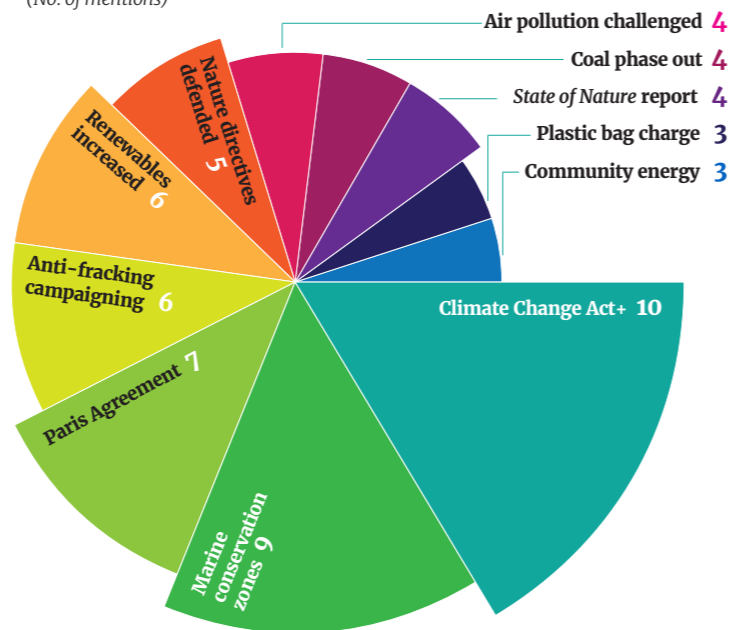
Sector successes

Asked about the greatest successes of the sector overall, six of the respondents' top ten themes related to climate and energy (as shown in chart 6).

Heading the list was the Climate Change Act and the subsequent adoption of carbon budgets. The Act was the result of concerted advocacy and campaigning by Friends of the Earth and other CSOs; it now forms the backbone of UK climate policy and was a scene-setter for other successes such as the Paris Agreement.

The creation of marine conservation zones and the defence of the EU's nature directives were the two highest-ranked conservation policy successes. The *State of Nature* report also features in the top ten, not least because respondents felt it marked a high point in collaboration across the conservation sector.

CHART 6: SECTOR'S SUCCESSSES
 (No. of mentions)



'The results reveal a good degree of consensus regarding how to increase impact, coupled with persistent concerns about the speed with which results are being achieved'

IN THEIR OWN WORDS

WHAT WERE THE UK ENVIRONMENTAL SECTOR'S GREATEST SUCCESSSES OF THE LAST FEW YEARS?

'Having stopped fracking across the UK so far, against the government's determination to open up much of the countryside to fracking. This has been possible through a strong and diverse grassroots movement of community-based campaigns, national and regional anti-fracking activist groups, and strong support of the anti-fracking campaign from various larger environmental NGOs. And through diverse tactics, from direct action protests to planning objections and now legal challenges, media work, policy advocacy, etc.'

'The scientific case against neonicotinoids was successfully communicated to the wider public, who now associate these pesticides with damage to bees. This was successful due to large organisations making effective use of their communication networks and social media, and having a simple straightforward message that was backed by science and a strong narrative of companies placing making a profit ahead of protecting life.'

'The growth in renewable energy across the UK is a key success – which often is lost in the noise and despair of recent "subsidy" cuts and energy policy changes. Renewables now account for 20%+ of all our electricity consumption (on target for 30% by 2020) and 8%+ of total energy use. Started with a campaign by Friends of the Earth in 1989, and someone should write the history of this success story (even if it isn't quite the scale of Denmark or Germany).'

'Landscape-scale delivery of conservation is a fundamental change in the way the conservation sector now works and has enabled more collaborations.'

Sector failures

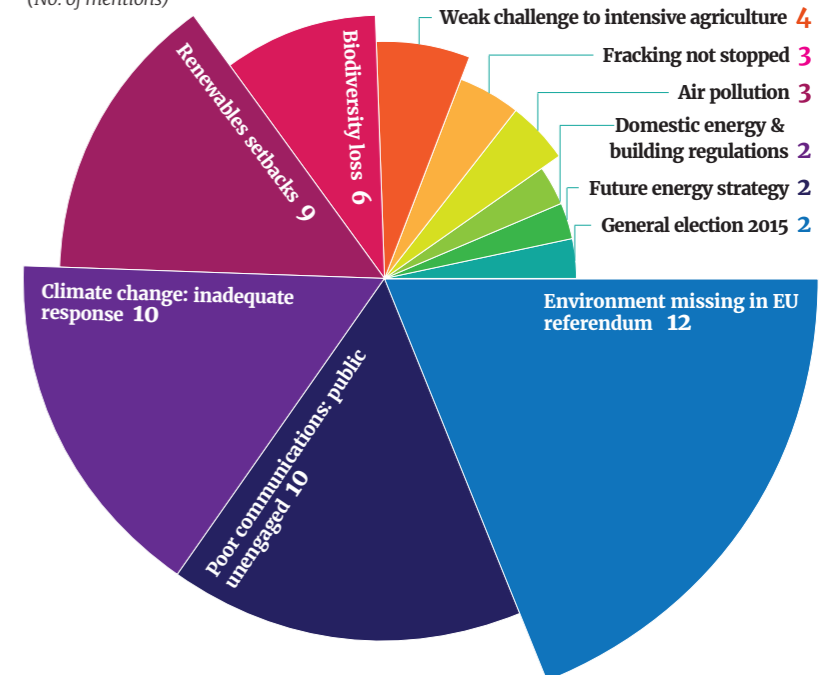
Some of the work that features in the sector's collective list of successes also appears in the list of the top ten failures, reflecting the fact that while CSOs may have helped put issues on the agenda there is much that remains to be done.

For example, some respondents saw campaigns against fracking as a failure because the government has not shut the door on shale gas development. To others, this work is a success – not only because fracking has not yet moved forward at anything like the scale its supporters would like – but also because a strong, vibrant grassroots movement has been built around this issue. Given how much CSOs want to improve their public outreach and mobilisation ability (see

section 4), it is not surprising that they take heart from this aspect of the anti-fracking campaign. There may also be an element of glass half-full versus half-empty thinking at play here. Delays and dilutions to climate policy are a concern to many in the sector, although others see cause to celebrate the ground that has been won, especially in the face of well-organised resistance by climate change sceptics and deniers.

Looming over the list of specific sector failures is the spectre of Brexit, and a persistent sense of regret that the environmental sector (broadly speaking) did not succeed in making the environmental risks of Brexit part of the public debate during the referendum campaign. We go into this in more detail in section 5.

CHART 7: SECTOR'S FAILURES
 (No. of mentions)



IN THEIR OWN WORDS

WHAT WERE THE UK ENVIRONMENTAL SECTOR'S GREATEST FAILURES OF THE LAST FEW YEARS?

'Brexit – we lacked a powerful, breakthrough, "emotional" story that everyone could unite behind. Too little appetite for taking risks.'

'I believe the sector collaborates well, but is not speaking as well as it could with one voice – despite [our] best efforts! A factor contributing to this may be branding of some of the larger NGOs getting in the way of truly altruistic working. Probably the major failing, though, is that as a sector, we are not as good as other sectors at reaching out to people beyond the natural environment sphere, instead talking to ourselves. There is also less cultural and ethnic diversity within the environment NGO sector, compared to others. Finally, we need to work harder to link the natural environment with people's health and wellbeing.'

'Allowing the government to scrap support for solar power, efficiency and onshore wind without paying a high political price despite the fact that the public supports all these technologies more than so-called alternatives e.g. nuclear, fracking. NGOs lacked capacity and coordination on energy policy and hadn't invested in building local support for renewables at community level (unlike Germany and Denmark) relying on EU and national legislation to push investment. This meant they could be characterised in the media as elites pushing expensive and wasteful energy distant from rural communities when the government wanted to change course.'

'Brexit – we lacked a powerful, breakthrough, "emotional" story that everyone could unite behind. Too little appetite for taking risks'

ENVIRONMENTAL HEROES AND VILLAINS

Respondents were asked to name the individuals who have done the most to advance the UK environmental agenda over the last three years. Caroline Lucas MP and Sir David Attenborough comfortably top this list, which has a strong focus on communicators and commentators. Some of these individuals, like Tony Juniper and Jonathan Porritt, have long experience of working for green CSOs; others, like Sir David Attenborough and Hugh Fearnley-Whittingstall, have used their high-profile positions to raise awareness of issues as diverse as climate change, biodiversity loss and food waste. The relatively

high ranking of Mark Carney, Governor of the Bank of England, is perhaps a sign of the sector's increasing focus on the financial system and its environmental impacts. When we asked which individuals had done the most to hinder UK environmental progress in the last three years, the list was dominated by current and former politicians, with George Osborne, David Cameron and Nigel Farage at the top, largely because of their role in Brexit, but also because of the previous government's promotion of fracking and road-building, and cutbacks to support for renewable energy.

CHART 8: ENVIRONMENTAL HEROES

(No. of mentions)

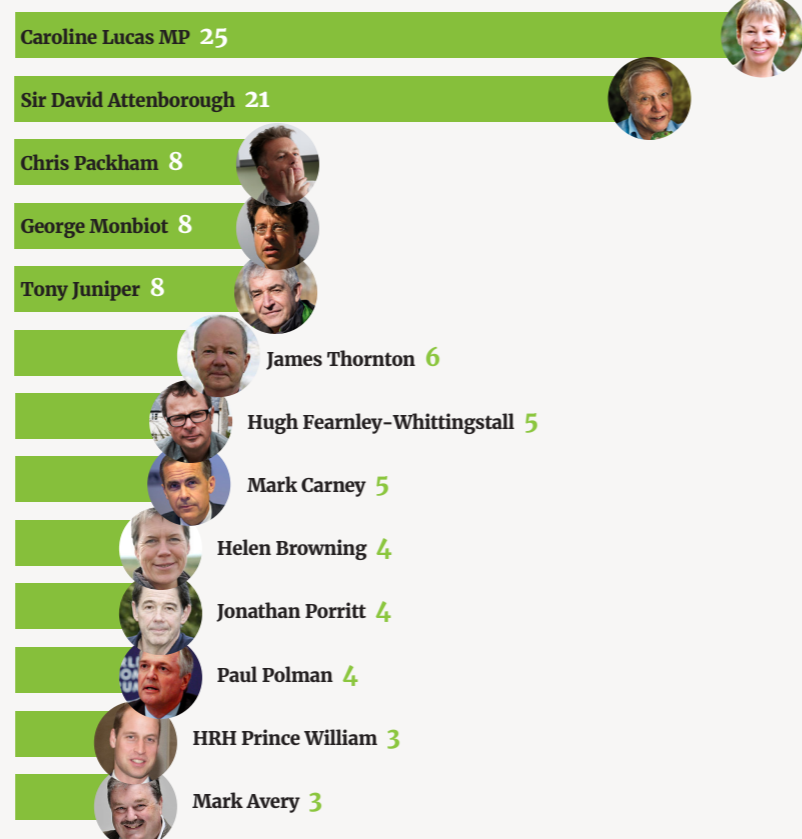
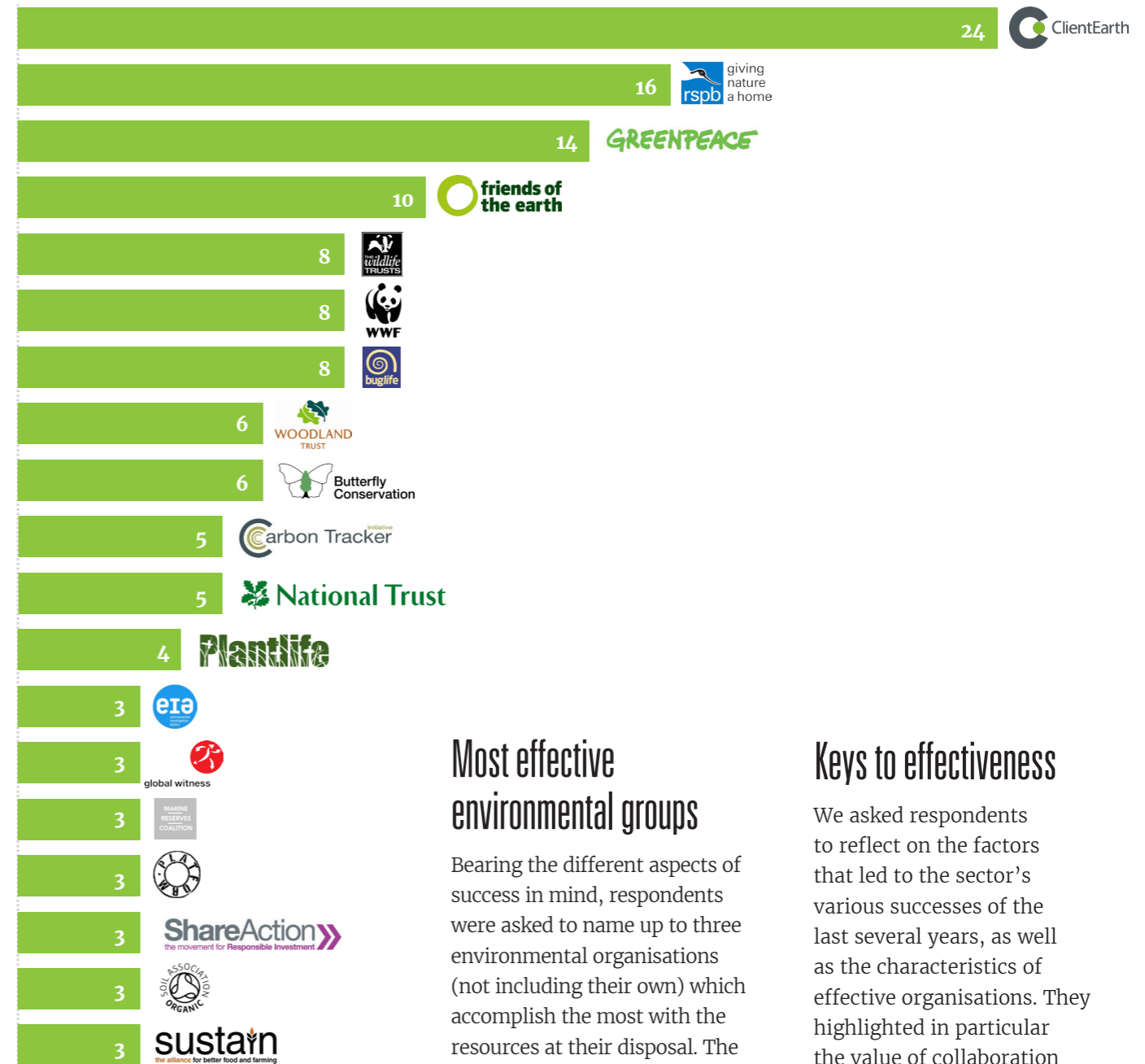


CHART 9: MOST EFFECTIVE ENVIRONMENTAL CSOs

(No. of mentions)



Most effective environmental groups

Bearing the different aspects of success in mind, respondents were asked to name up to three environmental organisations (not including their own) which accomplish the most with the resources at their disposal. The organisations that received the most mentions are listed in chart 9. All groups that were mentioned at least once are listed in Appendix 4. ClientEarth is clearly the CSO seen to be most effective, relative to its resources, with respondents using terms like 'innovative' and 'unique' about its work on air pollution and other issues. It is also perceived to work in a collaborative way, and to provide the sector with important skill sets, namely 'legal analysis' and 'strategic litigation'.

Keys to effectiveness

We asked respondents to reflect on the factors that led to the sector's various successes of the last several years, as well as the characteristics of effective organisations. They highlighted in particular the value of collaboration at different levels, the effectiveness of well-executed political advocacy and the value of harnessing sound research. In addition, many responses focused on strong communications, whether work that used narrative to tell a compelling story or particularly effective messaging and communication of data. These factors are explored further in section 5.

4 Uncertain Times: Brexit, Closing Space, and the Context for Environmental Work Here and Abroad

The political context in which UK environmental groups operate has shifted dramatically since the publication of EFN's first survey of environmental leaders in late 2013. Back then the idea that the UK would leave the EU seemed highly unlikely.

Fast forward to today and the UK is set to exit the EU by spring 2019. The survey responses, submitted in late 2016 and early 2017, reveal a sector that is deeply troubled by the referendum result, and in some cases by its failure to make the environment more of a public issue during the referendum campaign.

As in other parts of civil society, environmental groups are still digesting what Brexit means. While there is great uncertainty about the future of environmental regulations, the majority of CSOs responding to the survey are actively working on Brexit, and there is some evidence that this is helping the sector to increase collaboration.

Meanwhile, organisations working both in the UK and abroad reported increasingly challenging conditions due to restrictions on civil society activity, a trend documented elsewhere.

FAILURE TO MAKE ENVIRONMENT A BREXIT ISSUE
.....
ABILITY TO UNDERTAKE ADVOCACY INCREASINGLY CONSTRAINED

Referendum regrets

As we saw earlier, respondents were frustrated that the sector did not manage to secure a higher profile for environmental issues during the referendum debate:

'[Our greatest failure of the last few years was] the sector as a whole not appreciating where the country was at, and being fragmented, reticent and complacent in making the environmental case amidst Brexit campaigning.'

A lack of preparedness for a Leave result was another problem cited by some, with one respondent noting a 'level of complacency' and 'no discussion about the effect that this would have on the movement and strategies more widely'.

A number of respondents cited recent developments in charity regulation as impeding their campaigning and lobbying activity in the run up to the Brexit vote. Other aspects of the so-called 'closing space' for civil society are explored at the end of this section.

'The Charity Commission and Electoral Commission guidance on Brexit made it very hard for charities to express opinions on Brexit, despite the huge impact this has on our work. The Lobbying Act makes it harder to campaign.'

Countdown to Brexit — regrouping and renewal

While the sector struggled to make its voice heard during the referendum campaign, it sprang into action quickly in the aftermath of the vote, with 66 per cent of CSOs reporting that they have developed strategic responses to potential Brexit scenarios. The prevailing view is that the UK has benefited in environmental terms from our membership of the EU, and the threat that regulatory standards will be watered down in the future (in pursuit of trade deals, for example) is perceived as a real risk. Many groups are focused on how to prevent a regulatory 'race to the bottom'.

'We have drafted a policy advocacy strategy in response to Brexit, which is in short to ensure that Brexit doesn't lead to deregulation and a "race to the bottom" to attract/retain corporations.'

'We have started to bring together a major civil society alliance on high standards (environment and social) and Brexit. It will, for the first time, coordinate messaging, campaign asks, research and expertise around seizing this moment to ensure the systemic challenge of deregulation is not embedded via Brexit.'

Respondents are also looking for ways to exploit the opportunities arising from Brexit, such as the need to rethink public support for both agriculture and fisheries. The level of ambition varies across the sector. For instance, one group talks of improving on the EU's current food labelling laws, another of taking Brexit 'as an opportunity to fundamentally rethink our future'.

'We're working in coalition with a range of NGOs to ensure we "bank" existing environmental protections – many of which stem from the EU – and that we seize opportunity to build even stronger protections.'

'[We are] using it as an opportunity to refocus [the] environmental sector on engaging outside of traditional audiences.'

'Over one-third of groups have had funding, strategy or other activities adversely affected by "closing space" measures in the UK'

66% DEVELOPING STRATEGIC RESPONSES TO BREXIT
.....
COLLABORATION PREFERRED WAY TO ADDRESS CLOSING SPACE

Closing space for civil society

At a time when environmental CSOs need to make a concerted effort to protect and strengthen UK policy, civil society groups are finding that their ability to undertake advocacy is increasingly constrained.

Over one-third of survey respondents report that their funding, strategy or other activities are adversely affected by 'closing space' measures in the UK. Commonly mentioned problems include the inhibiting effects of the Lobbying Act, fundraising regulations that affect communications with members and supporters, and Charity Commission guidelines that deterred environmental groups from engaging with the EU referendum campaign.

Organisations are seeking to counter this trend in various ways. Successes listed by one respondent include removing the 'worst excesses' of the Lobbying Act and securing changes to Charity Commission guidance. However, the sector feels that more needs to be done. Collaboration is the preferred way to address closing space. Several groups say they lack the

resources to work on these issues directly themselves, but that they are supportive of work being coordinated by larger environmental groups or umbrella third-sector organisations such as the National Council for Voluntary Organisations (NCVO).

'We are connected with NCVO, ACEVO and others in sharing information and exploring opportunities for collaboration and shared lobbying. This involves working with NGOs outside of the environment sector, which we believe is an effective way forward.'

'We are pushing for [the Lobbying Act] to be repealed as an unworkable piece of legislation. We have plans for a campaign to protect Judicial Review. And much more besides...'

Eleven UK-based organisations which focus on work abroad, either their own or that of local partners, also reported negative impacts from closing space in a total of 20 countries including India and China. An extreme manifestation of this is the increasing number of physical attacks on environmental and land defenders now reported on annually by Global Witness. Other problematic measures include policies that make it harder for groups to receive funds, or to organise protest events.

5 Improving the Sector's Impact

When we asked respondents about the keys to success, and the skill sets and approaches that most needed additional investment, three themes cropped up again and again: policy and advocacy work, collaboration, and sophisticated communications.

IN THEIR OWN WORDS

'Too many people in the environmental movement (including many, many funders!) want to engage in activities that are designed for people like us. To broaden our movement, we need to get really good at talking to, and more importantly, talking with and listening to, people not like us.'

'Many environmental charities seem to have a preference for being right rather than effective, so "take a stand" rather than work out how to build long-term shifts in public thinking on issues.'

'[Behavioural science, strategic communications and framing expertise] is a highly paid skill set which isn't easily available in this sector. We may need to share across more than one organisation in the sector to be able to afford it and make most use of the skills.'

- Collaboration
- Policy / Advocacy
- Communication
- Other

CHART 10: WHAT CONTRIBUTED TO SUCCESSES

(No. of mentions)

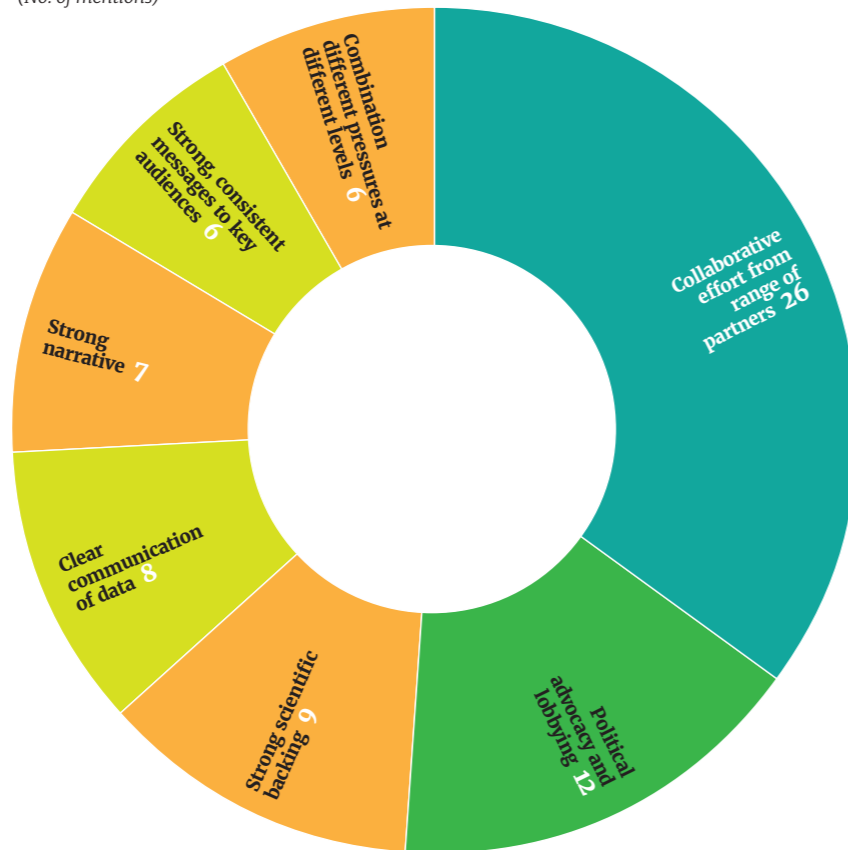


CHART 11: WHAT MAKES CSOs EFFECTIVE?

(No. of mentions)

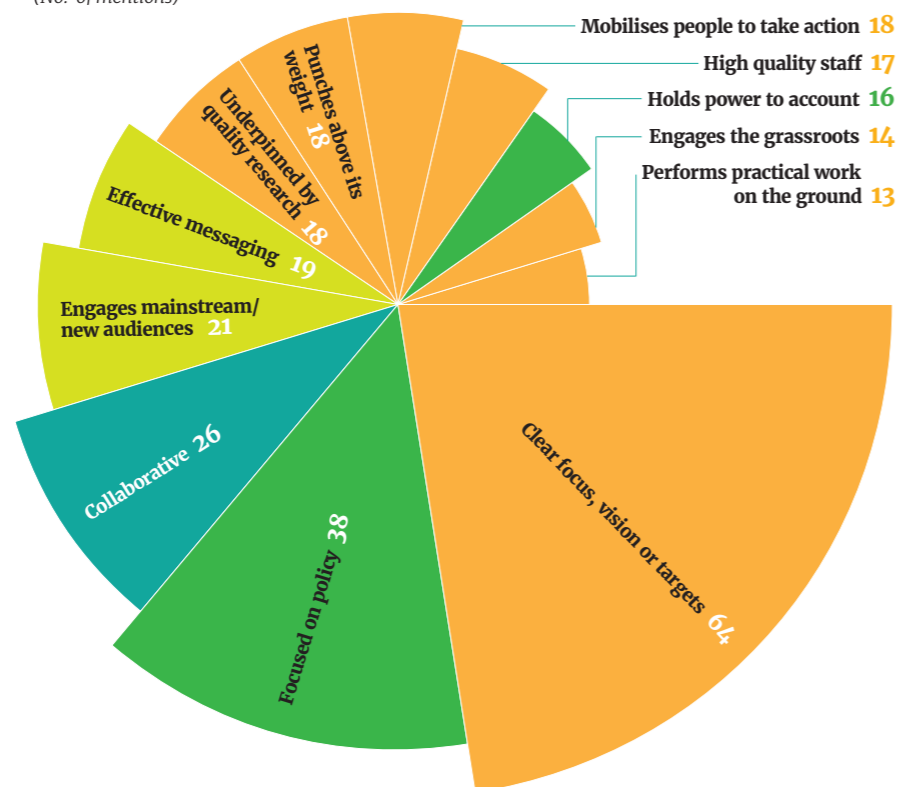


CHART 12: SKILL SETS GROUPS MOST NEED TO INVEST IN

Votes (weighted by ranking)

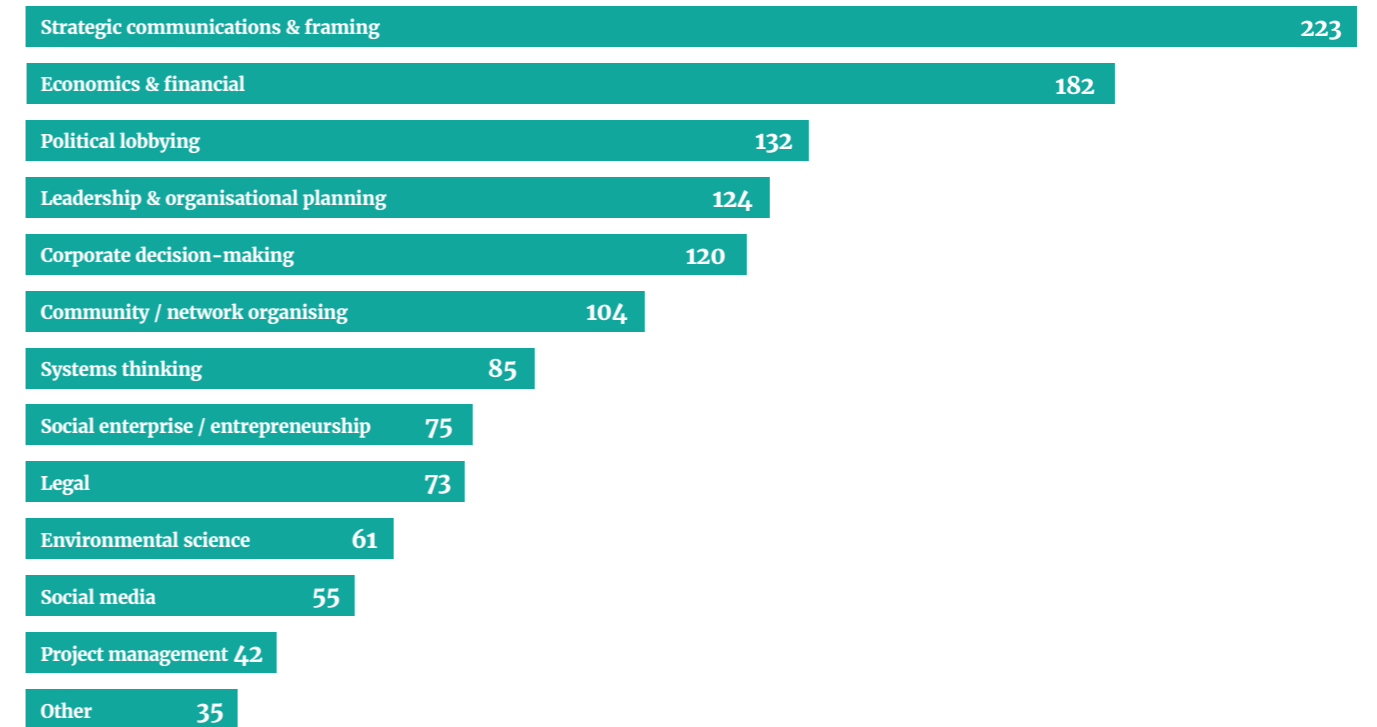
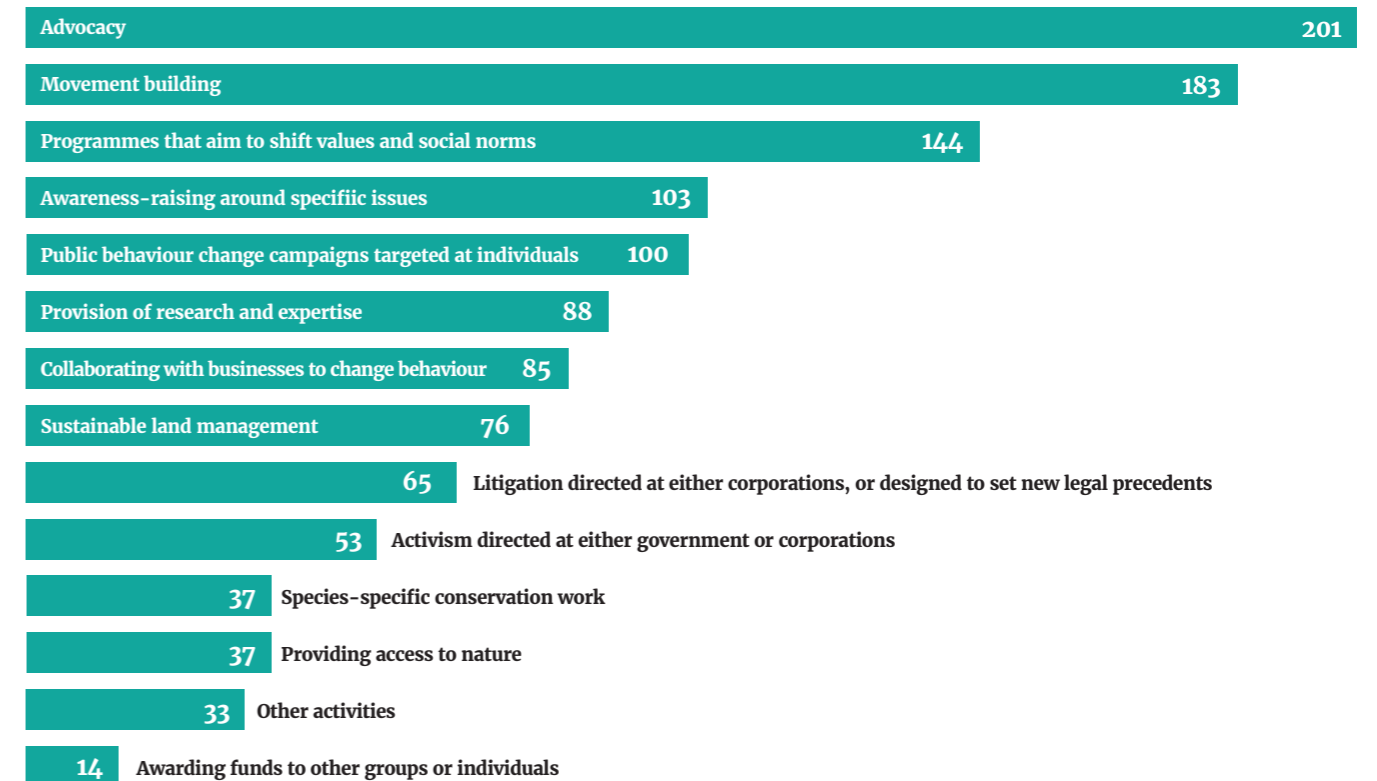


CHART 13: APPROACHES GROUPS MOST NEED TO INVEST IN

Votes (weighted by ranking)



Collaboration

We gave EFN's 2013 report the title *Passionate Collaboration?* because so many respondents to the initial survey referred to the importance of collaboration. Throughout this new survey, we again saw repeated calls for better and more collaboration. For example, when asked how the sector could better respond to unexpected developments (Brexit, say, or the 2008 economic crash), 'better collaboration' was mentioned by a third of respondents, with an emphasis on collaborative strategising and scenario planning. When we asked what three things respondents would like their fellow chief executives to do differently, nearly half the respondents

mentioned the need for better collaboration among green groups. Besides working together on the delivery of practical communications, campaigns and advocacy, there was a desire to collaborate more closely on overarching 'big picture' exercises, such as theories of change, priority setting, and articulating common goals and visions. We find it encouraging that over 60 per cent of respondents indicated that collaboration has increased over the last three years, both within the environmental sector and also with other sectors in civil society. There was a strong call for funders to help build on this, using their funds, convening power and 'big picture' view of the sector to help foster collaboration.

'A lot of the focus of many funders is on short-term policy achievements, even if those are very minor. I believe there needs to be much more support for long-term grassroots movement building in order to make meaningful social, economic and political changes possible.'

'To make [collaborations] more effective, the funding community could help "co-ordinate the movement" by providing platforms for collaboration between NGOs (such as retreats). We all have a broadly shared purpose and ways of going about it; if we spent more time learning about each other's strategies, we could achieve more.'

'Over 60 per cent of respondents indicated that collaboration has increased over the last three years'

6 Supporting a More Effective Sector: the Role for Funders

In the previous section we saw a strong call from within the sector for more resources and capacity in relation to communications, collaboration and advocacy work. When we asked respondents what they most wanted to tell funders, we received an equally clear set of responses, with a strong demand for more core and flexible funding, and for long-term funding. Chief executives in the sector see this as essential if they are to develop the capacity needed to increase effectiveness.

For example, we heard that core and unrestricted funding is essential as it allows organisations to:

- be flexible – to respond to unexpected developments and to seize opportunities as they arise
- collaborate – covering the costs (in terms of time and travel)
- conduct policy or advocacy work for which it is often impossible to secure project-based funding, even though this is generally agreed to be one of the keys to the sector's effectiveness
- take the time to strategise, developing their organisation or scoping out new projects
- acquire the skill sets they need to become more effective (see above), either through training or hiring new staff

In addition, nearly a third of recipients called for more long-term funding. EFN's ten-year data set on environmental grants in the UK backs up the notion that long-term support is hard to find: over 70 per cent of the organisations that have received grants for environmental work from trusts and foundations in the last ten years received just one grant during that period.

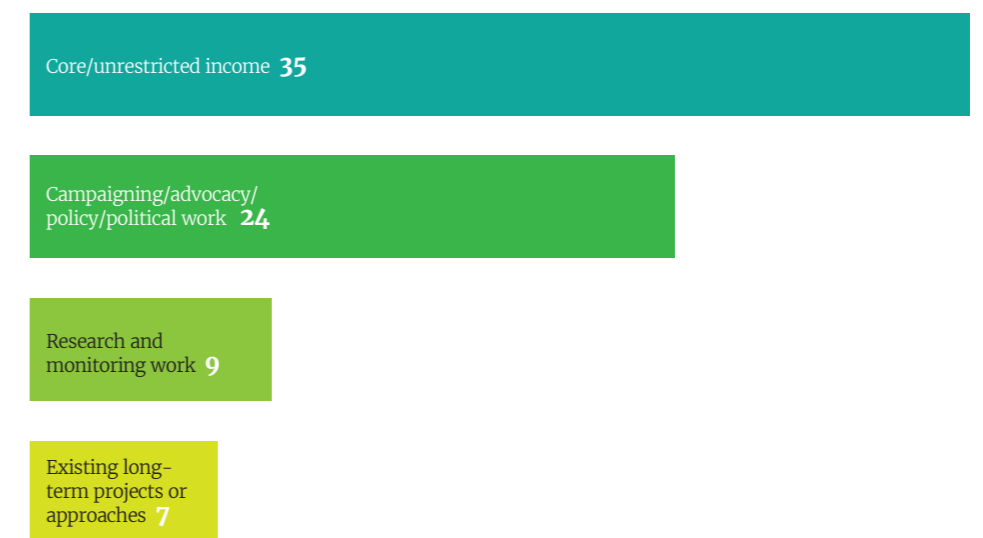
MORE CORE & FLEXIBLE FUNDING NEEDED
.....
RESOURCES FOR COMMUNICATIONS, COLLABORATION & ADVOCACY REQUIRED

'The majority of grants we receive are restricted. Without enough core funding it is challenging to invest in organisational capacity and skills building.'

'Core funding enables us to react quickly to immediate opportunities and threats that there is insufficient time to specifically fundraise for, [and] provides bridge funding whilst we fundraise and commit to projects with long-term planning needs where we cannot be certain of raising sufficient funding externally.'

CHART 14: WHAT IS HARD TO FUND

(No. of mentions)



'When we asked respondents what they most wanted to tell funders [they responded] with a strong demand for more core and flexible funding, and for long-term funding'

With respect to long-term funding, we heard that funding cycles are typically shorter than the time taken to achieve change. One respondent argued that programmes of 10–20 years are an appropriate time frame to consider, while several respondents asked for five-year grants. Tied to the call for more long-term funding is the tension between funding innovation and funding established initiatives that work. Several respondents also called for funders to help encourage new donors to support the sector.

‘Some funders are reluctant to fund “campaigns” and others do not like funding “research”, but it is well-evidenced campaigning that often wins the biggest gains for the environmental movement.’

‘Full cost recovery is fundamentally important – without it charities cannot be strategic, collaborative and innovative.’

‘Offer more multi-year funding. You will not get transformational projects that last less than 12 months.’

‘Support new initiatives but don’t stop funding current work which succeeds.’

‘Funders themselves need to create a funding environment for the best initiatives, taking them on a funding “journey” from funder to funder, rather than the current situation of time being wasted and projects and programmes finishing early because of the lack of coordination between them.’

The last quote ties into a general concern around access to funding. Several respondents expressed frustration that funders are too limited in the types of groups they will work with, either through the operation of eligibility and exclusion criteria, or through a failure to seek out less visible grantees. There was a sense that funders need to think more in ‘big-picture’ terms – several respondents urged foundations to take a ‘movement-wide’ view, joining together to identify the gaps in their funding and eligibility criteria as well as bringing their grantees and networks together to foster greater collaboration:

‘Funders still tend to fund single issues and narrow environmental causes – the funding sector as a whole could have much more impact if it was more systemic and collaborative.’

‘If you have funding streams that focus on particular areas, you have a huge opportunity to bring those projects and organisations together and foster greater collaboration and shared learning, and broker future partnerships.’

Finally, there was also a feeling – from the smaller organisations – that too many philanthropic grants are directed to large established NGOs that often have the least need of trust and foundation support.

Conclusions

Responses to the ‘pulse-taking’ survey paint a picture of a diverse sector that accomplishes a remarkable amount while constantly battling to secure the resources it needs, and in the face of considerable opposition from vested interests.

One of the key questions in our minds when devising the survey was, ‘What does the environmental sector need to become much more effective?’ We received surprisingly clear answers from the sector’s leadership on that point.

We saw that successes to date have been considered to be largely due to **strong advocacy** work, **fruitful collaborations** and **effective messaging** that reaches audiences beyond the choir. Likewise, failures were blamed on the absence of such approaches.

Recognising this, respondents felt the need for more investment in **advocacy**

**STRONG
ADVOCACY**
.....
**FRUITFUL
COLLABORATIONS**
.....
**EFFECTIVE
MESSAGING**
.....
**CORE
FUNDING**
.....
**LONG-TERM
FUNDING**

(as well as in political lobbying expertise), **movement building**, and various approaches to **communicating effectively** with different audiences, including programmes aimed at shifting social norms, changing behaviour and raising awareness. Significant skills gaps exist in the sector not just around political lobbying but in terms of ‘behavioural science, strategic communications and framing expertise’ and ‘economic and financial expertise’ (which also topped the list of approaches needing more investment in 2013).

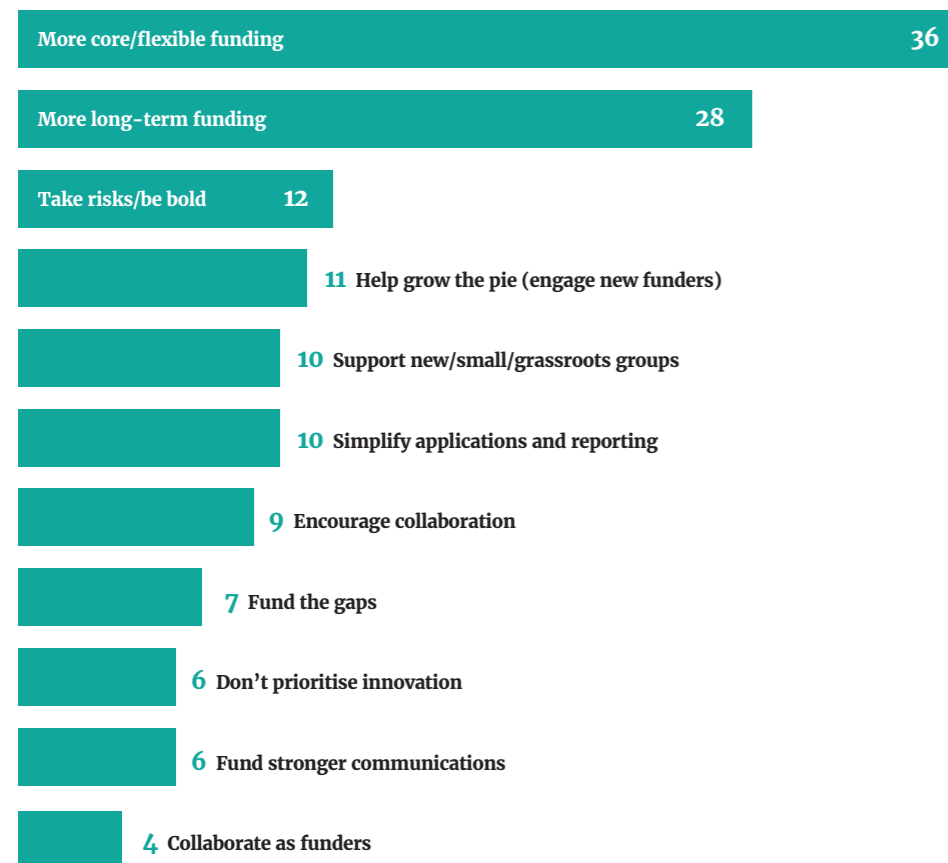
Collaboration is on the rise, and respondents think the sector would benefit from even more and ‘better’ collaborative efforts, with groups working together on communications, campaigns and advocacy as well as coming together to work more closely on overarching ‘big-picture’ strategising. Two of the biggest developments affecting civil

society groups of all kinds – Brexit and the so-called ‘closing space’ for civil society – have both spurred greater collaboration among green groups. Collaboration, of course, takes time, and time is money. Funders were asked to support the full costs of collaboration through their grants.

There were numerous other clear messages for funders throughout the survey. In addition to a call for more support for the kinds of work spelled out above, there was a resounding request (as in 2013) for more **core and unrestricted** funding for environmental work. Core funding allows groups to be ‘strategic, collaborative and innovative’, as one respondent put it. In addition, there was a call for more **long-term** (i.e. multi-year) support from funders to support change that takes time and to allow organisations to step off the fundraising hamster wheel for long enough to make progress towards their missions.

CHART 15: IF YOU COULD SAY THREE THINGS ANONYMOUSLY TO FUNDERS . . .

(No. of CSOs)



‘We saw that successes to date have been considered to be largely due to strong advocacy work, fruitful collaborations and effective messaging that reaches audiences beyond the choir. Likewise, failures were blamed on the absence of such approaches’

Appendix 1 Survey questions

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

SECTION 1: YOUR ORGANISATION'S INCOME

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 in the UK
- Grants or donations from EU sources
- Grants or donations from local authorities
- Grants or donations from the Big Lottery Fund
- Grants or donations from the Heritage Lottery Fund
- Grants or donations from other Lottery sources (e.g. People's Lottery, Postcode Lottery)
- 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 Which of the sources of income listed in question 4 would you say requires the most effort per pound received (in terms of application procedures, managing and servicing the relationship with the donor, reporting, and so on).

[All categories from Question 4 were repeated for this question.]

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

7 What (if any) kinds of work have you found it hard to secure funding for in the last three years?

8 Do you expect your organisation to lose funding as a result of the UK's decision to leave the European Union? (Yes/No)

9 What percentage of your organisation's income do you estimate is at risk as a result of Brexit?

10 Can you give us an example of something your organisation could not have accomplished without core funding?

SECTION 2: ORGANISATIONAL PROFILE AND PRIORITIES

11 In the last year how many people contributed money and/or volunteered their time to your organisation?

12 How many full-time equivalent (FTE) staff, including operations staff, work on environmental issues for your organisation?

13 Please provide an estimate (in percentages) of how your organisation's expenditure in your last full financial year breaks down between the following 13 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
- Multi-issue work that combines two or more of the above categories

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

15 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. rethinking concepts like wellbeing 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, or designed to set new legal precedents
- 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 expertise (e.g. scientific research, or policy development and 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)
- Providing access to nature (e.g. through urban green space or the countryside)
- Service provision (e.g. energy efficiency advice, farmers' markets, community renewables, demonstration of alternative futures)
- Movement building (e.g. grassroots mobilisation, constituency building, civil society co-ordination, coalition building and training)
- Funding (e.g. awarding grants to other organisations)
- Other activities

16 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 countries outside the UK)
- Global institutions (e.g. United Nations, OECD, World Trade Organisation)
- Other

SECTION 3: APPROACHES AND SKILL SETS

17 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?

[All categories from Question 15 were repeated for this question.]

18 Which of the following skill-sets do you think UK environmental groups most need to invest in over the next few years?

- Economics and/or financial expertise
- Political lobbying expertise
- Legal expertise
- Environmental science expertise
- Behavioural science, strategic communications and framing expertise
- Social media expertise
- Understanding of decision-making processes and institutional culture within the corporate sector
- Leadership and organisational planning
- Social enterprise and/or entrepreneurial expertise
- Project management expertise
- Community/network organising expertise
- Systems thinking expertise
- Other

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

20 The 2013 *Passionate Collaboration?* report highlighted a desire for more collaboration both within the environmental sector and also with other sectors within civil society. From where you sit, do you feel that collaboration has increased, decreased, or stayed the same in the past three years? Please describe any changes that you have observed.

21 Please tell us about any specific collaborative efforts that you feel are working well. What would make those collaborations even more effective?

22 Please name the other civil society organisations with which your organisation collaborates most actively on environmentally-related issues through joint projects, co-branding or other relationships.

23 Looking back over the last two to three years, which are the achievements of your organisation of which you are most proud?

24 We may look to profile some of these achievements alongside other results from the survey. Would you be happy for someone from EFN to contact you to learn more? (Yes/No)

SECTION 4: HEROES AND ZEROS

(note that all responses to this section, as throughout the survey, will be kept anonymous)

25 Within the UK, which individuals have done the most to advance the environmental agenda over the last three years?

26 Within the UK, which individuals have done the most to hinder environmental progress in the last three years?

SECTION 5: HEALTH OF THE ENVIRONMENTAL SECTOR

27 Which non-profit UK environmental organisations (not including your own) do you think accomplish the most, given the resources at their disposal?

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

29 Please briefly describe one of the UK environmental sector's greatest successes over the past few years. What contributed to that success?

30 Please briefly describe one of the UK environmental sector's greatest failures over the past few years. What characteristics of the sector contributed to that failure?

31 Brexit is likely to create fundamental changes to the context in which UK environmental organisations operate. Has your organisation developed strategic responses to potential Brexit scenarios? (Yes/No)

32 Please briefly describe how your organisation is responding to Brexit.

33 Are your organisation's funding, strategy or other activities being constrained in any way by the so-called 'closing space' for civil society, either in the UK or in other countries where you work?

34 Is your organisation actively trying to address the 'closing space' for civil society? If so then please briefly tell us what you are doing.

35 How do you think the environmental sector could best improve its ability to respond quickly to unexpected developments, (e.g. the 2008 financial crash, the 'horse-gate' meat contamination scandal, uncertainty about what form Brexit might take)?

36 If you could ask your fellow chief executives in the environmental sector to do three things differently, what would they be?

37 If you could say three things anonymously to funders of the sector, what would they be?

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

Appendix 2 Organisations responding to the survey

| | |
|--|--|
| 10:10 | GM Freeze |
| A Rocha International | Green Alliance |
| Ashden | Greenpeace UK |
| Aviation Environment Federation | Groundwork South Tyneside & Newcastle |
| Avon Wildlife Trust | Institute for European Environmental Policy |
| Bat Conservation Trust | John Muir Trust |
| Biofuelwatch | Julie's Bicycle |
| Bioregional Development Group | Lancashire Wildlife Trust |
| Black Environment Network | London Wildlife Trust |
| Blue Marine Foundation | Lydd Airport Action Group |
| Borders Forest Trust | Marine Conservation Society |
| Buglife – The Invertebrate Conservation Trust | National Trust |
| Butterfly Conservation | Natural History Museum |
| CAFOD | new economics foundation |
| Cambridge Carbon Footprint | No 2 Nuclear Power |
| Campaign for National Parks | Oasis Community Church, Centre and Gardens |
| Campaign to Protect Rural England | Operation Noah |
| Carbon Tracker Initiative | Organic Research Centre |
| CDP Worldwide | People & Planet |
| Centre for Alternative Technology | Permaculture Association |
| Centre for Sustainable Energy | Peterborough Environment City Trust |
| Chatham House Energy, Environment & Resources Department | Plantlife International |
| CHEM Trust | Population Matters |
| China Dialogue Trust | RBG Kew/Kew Foundation |
| Christian Aid | RSPB |
| ClientEarth | Sandbag |
| Climate Outreach | Scottish Environment LINK |
| Compassion in World Farming | Scottish Wildlife Trust |
| Corporate Watch | Severn Wye Energy Agency |
| E3G | ShareAction |
| Earthwatch Europe | Soil Association |
| Environmental Investigation Agency | Somerset Wildlife Trust |
| Fauna & Flora International | Surfers Against Sewage |
| Federation of City Farms and Community Gardens | The Climate Coalition |
| Fern | The Conservation Volunteers |
| Food Ethics Council | The Kindling Trust |
| Forum for the Future | The Rainforest Foundation UK |
| Freegle | The Wildlife Trusts* |
| Freshwater Habitats Trust | The Zoological Society of London |
| Friends of the Earth (England, Wales & Northern Ireland) | United Kingdom Without Incineration Network |
| Friends of the Earth Scotland | Warwickshire Wildlife Trust |
| Galapagos Conservation Trust | Wildfowl & Wetlands Trust |
| Garden Organic | Wildlife and Countryside Link |
| GeneWatch UK | Wildlife Trust for Bedfordshire, Cambridgeshire and Northamptonshire |
| Global Action Plan | Woodland Trust |
| Global Witness | WWF UK |

* We received some responses from individual Wildlife Trusts as well as a response from the overarching organisation on behalf of the Trusts as a whole. We ensured that we did not double count income and expenditure figures.

Appendix 3 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 MULTI-ISSUE WORK – there remain grants that are hard to allocate to specific categories, generally because they take the form of core funding to an organisation that works on a range of different issues, or because the grant supports environmental media titles (e.g. Resurgence & Ecologist) or environmental education projects covering a wide range of issues. Some grants provided to generalist re-granting organisations are included in this category as it is not possible to identify which issues will be supported when the funds are re-granted.

10 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.

11 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.

12 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.

13 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 4 Environmental organisations accomplishing the most, relative to the 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?'

| ORGANISATION | NUMBER OF MENTIONS | ORGANISATION | NUMBER OF MENTIONS | ORGANISATION | NUMBER OF MENTIONS |
|---|--------------------|--|--------------------|--------------------------------------|--------------------|
| ClientEarth | 24 | ActionAid | 1 | London Cycling Campaign | 1 |
| RSPB | 16 | Aeolian Islands Preservation Fund | 1 | London Mining Network | 1 |
| Greenpeace UK | 14 | Artsadmin | 1 | National Energy Action | 1 |
| Friends of the Earth (England, Wales & Northern Ireland) | 10 | Ashden | 1 | NetZero | 1 |
| The Wildlife Trusts | 8 | Birdlife International | 1 | Oceana | 1 |
| WWF UK | 8 | Blue Marine Foundation | 1 | Pentabus | 1 |
| Buglife – The Invertebrate Conservation Trust | 8 | Blue Ventures | 1 | People & Planet | 1 |
| Woodland Trust | 6 | BP or Not BP | 1 | Permaculture Association | 1 |
| Butterfly Conservation | 6 | Brighton Energy Co-operative | 1 | Practical Action | 1 |
| Carbon Tracker | 5 | Bristol Energy Co-operative | 1 | Renewable World | 1 |
| National Trust | 5 | British Trust for Ornithology | 1 | RGB Kew | 1 |
| Plantlife | 4 | Campaign to Protect Rural England | 1 | Rising Tide | 1 |
| Environmental Investigation Agency | 3 | CDP Worldwide | 1 | River of Flowers | 1 |
| Global Witness | 3 | CHEM Trust | 1 | Stop Climate Chaos (Scotland) | 1 |
| Marine Reserve Coalition | 3 | Christian Aid | 1 | Stroud District Council | 1 |
| Platform | 3 | Clean Air for London | 1 | Surfers Against Sewage | 1 |
| ShareAction | 3 | Climate Bonds Initiative | 1 | TREE AID | 1 |
| Soil Association | 3 | The Climate Coalition | 1 | The Tree Council | 1 |
| SUSTAIN | 3 | Coal Action Network | 1 | Trees for Life | 1 |
| 350.org | 2 | Community of Arran Seabed Trust | 1 | Tusk Trust | 1 |
| Bat Conservation Trust | 2 | CPRE Kent | 1 | UK Tar Sands Network | 1 |
| Campaign for Better Transport | 2 | Earth First | 1 | UN Environment | 1 |
| Centre for Sustainable Energy | 2 | Energy Saving Trust | 1 | Vincent Wildlife Trust | 1 |
| Climate Outreach | 2 | Esmée Fairbairn Foundation | 1 | WILDCOAST | 1 |
| E3G | 2 | Federation of City Farms and Community Gardens | 1 | Wildfowl & Wetlands Trust | 1 |
| Groundwork UK | 2 | Feedback | 1 | Women's Institute | 1 |
| Keep Britain Tidy | 2 | FrackFree Lancashire | 1 | The World Land Trust | 1 |
| Marine Conservation Society | 2 | Free Word | 1 | Waste and Resources Action Programme | 1 |
| Oxford Real Farming Conference | 2 | Freegle | 1 | World Rainforest Movement | 1 |
| Pasture-Fed Livestock Association | 2 | Freshwater Habitats Trust | 1 | | |
| People's Trust for Endangered Species | 2 | Friends of the Earth Scotland | 1 | | |
| Rewilding Britain | 2 | Friends of the Lake District | 1 | | |
| Scottish Environment LINK | 2 | GAIA – Zero Waste Europe | 1 | | |
| Transition Network | 2 | Game and Wildlife Conservation Trust | 1 | | |
| The Zoological Society of London | 2 | Global Action Plan | 1 | | |
| 10:10 | 1 | Global Footprint Network | 1 | | |
| 2 Degrees Investing Initiative | 1 | Global Justice Now | 1 | | |
| 38 Degrees | 1 | Good Energy | 1 | | |
| 5 Gyres Institute | 1 | IUCN UK Peatland Programme | 1 | | |
| A Rocha | 1 | La Via Campesina | 1 | | |
| | | Landworkers Alliance | 1 | | |



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