

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@greenfund.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)*
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- *Providing amenities such as access to urban green space or the countryside*

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

Environmental CSO	No. of mentions	Environmental CSO	No. of mentions	Environmental CSO	No. of mentions
Climate Group, The	1	GM Freeze	1	Regen SW	1
Climate Justice Collective	1	Growing Communities	1	Resurgence & Ecologist	1
Coal Action Scotland	1	International Institute for Environment & Development	1	RSPB (Scotland)	1
Community Energy Scotland	1	Joseph Rowntree Charitable Trust*	1	Sandbag	1
Compassion in World Farming	1	Joseph Rowntree Reform Trust*	1	Seeds for Change	1
Conservation Volunteers, The	1	Joseph Rowntree Foundation*	1	ShareAction	1
Creekside Discovery Centre	1	Julie's Bicycle	1	Shareenergy	1
Econexus	1	Kindling Trust, The	1	Sigrid Rausing Trust*	1
Elephant Family	1	Land Trust, The	1	Size of Wales	1
Environmental Justice Foundation	1	Landlife	1	Stop Climate Chaos Scotland	1
European Environmental Paper Network	1	Learning through Landscapes	1	Surfers Against Sewage	1
Fairtrade Foundation, The	1	London Cycling Campaign	1	Tear Fund	1
FARM Africa	1	London Mining Network	1	Town & Country Planning Association	1
Fish Fight	1	Low Level Radiation Campaign	1	Transform Scotland	1
Fishing for Litter	1	Marine Conservation Society (Scottish arm)	1	UK Feminista	1
Food Climate Research Network	1	Marine Stewardship Council	1	UK Food Sovereignty Movement	1
Food Ethics Council	1	No Dash For Gas	1	Water Aid	1
Frengle	1	Oxfam	1	Women's Environmental Network	1
Friends of Brede Valley	1	Pond Conservation	1	World Development Movement	1
Froglife Trust, The	1	Positive Money	1	World Resources Institute	1
Fuel Poverty Action	1	Project Dirt	1	Zoological Society of London	1
Garden Organic	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.”