Environmental
Funders Network

What the Green Groups Said 2021

Insights from the UK Environment Sector

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MAY 2022

Acknowledgements

Harriet Williams and Jon Cracknell are founders of The Hour is Late (www.thehourislate.com), a consultancy that specialises in the analysis of civil society movements and the allocation of philanthropic funding. Jon co-founded the Environmental Funders Network (EFN), and Harriet is a current board member. Florence Miller is Director of EFN and Patricia Cremona is EFN's Programme and Research Coordinator. Jane Cabutti, Julie Christie, Emma Clyde, Aliyah Green and Helen Mian all provide essential support to EFN's overall work programme. The report was designed by Peter Bishop of Banyan Design (www.banyandesign.co.uk).

EFN receives grants, donations and in-kind support from many of its member organisations. We are extremely grateful for this support, without which the network could not exist in its current form. The following trusts and foundations provided core funding grants in 2021: Esmée Fairbairn Foundation, Garfield Weston Foundation, Impatience Earth, John Ellerman Foundation, Mark Leonard Trust, Synchronicity Earth and Taurus Foundation, with an additional 100 foundations and individuals supporting EFN's work through membership contributions.

EFN's board of trustees is chaired by Hugh Raven (a trustee of the Highlands and Islands Environment Foundation), and includes Catherine Bryan (a trustee of Synchronicity Earth), Sian Ferguson (Trust Executive of the Ashden Trust, JJ Charitable Trust and Mark Leonard Trust), Liz Gadd (consultant with New Philanthropy Capital and a trustee of Pesticide Action Network UK), Hugh Mehta (Climate Philanthropy & Partnerships Manager, Children's Investment Fund Foundation), Fiona Napier (Africa Engagement Lead with UNFCCC Climate Champions team and a trustee of Lamu Environment Foundation), Champa Patel (Director of Innovation and Deputy Director, Future of Conflict programme for the International Crisis Group), Eva Rehse (Director of Strategy and Global Integration, Global Greengrants Fund and co-chair of EDGE Funders Alliance), and Harriet Williams (consultant with The Hour is Late and Forest Programme Director, The Ecology Trust). EFN would like to thank them for their leadership and ongoing support. We are also grateful to the members of EFN's Advisory Group who guide our work to grow environmental philanthropy (Jamie Arbib, Cindy Forde, Ben Goldsmith, Anna Guyer, Rachel Harrington, Edward Mallinckrodt, Bianca Pitt, Hugh Raven and Jessica Sweidan).

We are very grateful to the chief executives of the environmental organisations who took the time to complete the survey that underpins this report, and whose opinions form the basis of this report.

Finally we would like to thank the advisory group that provided input for the design of the survey. This comprised: Sufina Ahmad (John Ellerman Foundation), Richard Benwell (Wildlife and Countryside Link), Ed Matthew (E3G), Craig McGuicken (Northern Ireland Environment Link), Andrew Simms (New Weather Institute / Rapid Transition Alliance), Matt Shardlow (Buglife), Karen Whitfield (Wales Environment Link), and Karl Wilding (independent consultant, formerly NCVO).

This report, together with previous editions of the *What the Green Groups Said* series and other EFN publications and resources relevant to environmental philanthropy, is available online at www.greenfunders.org/resources.

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Foreword

After 30 years at Greenpeace, I'm often asked what the environment sector has collectively achieved in the time since I joined, which nicely coincided with the Rio Earth Summit in 1992. During that time, we have chalked up many victories – from phasing out coal to getting a ban on the internal combustion engine, to name two key accomplishments in the UK alone. But we aren't winning. Greenhouse gas emissions in those 30 years amounted to more than all the emissions in the whole of history up to that point. An Ipsos Earth Day poll in 31 countries concluded: 'Amongst the things that people worry about, climate change is moderate amongst other concerns.' Just under half said climate was an area of concern, placing it eighth on a list of 15 topics. Concern was lowest in Great Britain, Japan, the Netherlands, Russia and China.[1]

So what should the environment sector do differently?

Being honest with ourselves is a good place to start. This report highlights when the sector has operated at its best, and the lessons that can be learnt from that. It also highlights what sector leaders think are key issues that must be addressed: difficulties in collaborating effectively, communicating beyond traditional audiences, and addressing diversity, equity and inclusion more broadly.

There is often an assumption that everyone in the sector agrees with each other; of course we don't. There are lots of challenging issues like support for offshore wind or tidal power where there are significant barriers to cooperation. It's not just that the larger organisations can be more competitive than supermarkets. We punch below our weight because we lack alignment, we are needlessly protective of our brands, and too much time and money is wasted on duplication. We forget the world doesn't revolve around us.

In terms of communicating beyond our traditional audiences this couldn't be more critical. As the Ipsos poll shows, we are clearly talking to ourselves. We aren't breaking down the barriers. The things people are currently concerned about – war, jobs, health, quality of life and the cost of living, including energy bills – are all integrally connected to how we respond to the climate emergency. But we aren't connecting to those concerns in the ways we talk about the crisis. And lastly, although the link between racism and the environment is being taken more seriously, this isn't (just) about being 'nice' inclusive organisations. It's about recognising that the climate crisis can't be solved without addressing systemic racism. There is a long way still to go, given that UK environmental organisations are second only to farmers in their lack of diversity.

One call that emerges from the report is for campaigns to be bolder, especially in holding decision-makers to account. Critical to this is changing how coalitions work. Rather than operating at the pace of the slowest member, it's the responsibility of all the organisations involved to increase their ambition, and make coalitions work as a race to the top. Funders can facilitate this better by asking the question of potential grantees: what is the role of your organisation in achieving the change you want to see, and what are you doing to support other actors?

Many of the ingredients we need to be a much more powerful force for change are there. With the right focus and resources, let's turn our isolated wins into a shifting tide.

John Sauven
Former Executive Director
Greenpeace UK

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1 https://www.ipsos.com/sites/default/files/ct/news/documents/2022-04/Ipsos%20-%20Global%20Advisor%20-%20Earth%20Day%202022%20-%20Release%201.pdf

Executive Summary

The leaders of 116 UK civil society organisations (CSOs) that work on environmental issues responded to the Environmental Funders Network's latest sector survey, the third in our *What the Green Groups Said* series.

Completed in the autumn of 2021, the survey looks back at how the sector has reacted to recent events, in particular the pandemic, Brexit and increasing public and political interest in the climate and nature crises. Looking forward, respondents see both opportunity and threat on the road ahead, and there is considerable consensus about what the sector needs in order to maximise its impact.

We learnt about how these 116 CSOs source their income, as well as how their expenditure is allocated across thematic issues, geographies and strategies used to achieve positive change.

We asked respondents to reflect on successes and failures, and on key skills and strategy gaps. They also told us how they think funders – and philanthropic funders in particular – can help to build and sustain a more effective environmental sector, through their grantmaking and wider practices.

The 116 CSO respondents had a combined environment-related income of £730 million in the previous financial year; income from individuals accounts for nearly half the combined total.

Income

The 116 CSO respondents had a combined environment-related income of £730 million in the previous financial year. Income from individuals accounts for nearly half the combined total, in the form of donations, legacies, membership fees and sales to the public. Foundation grants comprise a further 13%, and are by far the most common income source, received by over 90% of respondents.

Smaller CSOs tend to be more reliant on foundation funding, although over 60% of the total value of foundation funding recorded in this survey was received by the largest 25 organisations. Despite a long-running conversation about the value of core and unrestricted funding, the majority of respondents say that these kinds of grants are not getting any easier to acquire.

Fears that Covid-19 or Brexit would reduce the incomes of environmental groups have not yet been borne out, among this set of respondents at least. An uptick in individual giving and in the availability and flexibility of foundation grants helped some respondents to weather the pandemic. Most of the 116 CSOs have increased their organisational incomes over the last two years, and two thirds of respondents rate their financial health as 'good', although some cite difficulties in securing multi-year grants as a source of ongoing financial insecurity.

Expenditure

The combined environment-related expenditure of the 116 respondent CSOs amounted to £673 million in the previous financial year. Of this, 51% was directed to three categories of nature conservation *(biodiversity & species preservation, terrestrial ecosystems, coastal & marine ecosystems)*, and 13% to issue categories most closely associated with climate change *(climate & atmosphere, energy* and *transport)*. Smaller CSOs tended to allocate a lower portion of their expenditure to conservation issues and a higher portion to climate issues.

Work on *transport, trade & finance, toxics & pollution* and *consumption & waste* continued to attract a lowly share of total expenditure, as in previous editions of this survey.

Political advocacy is the most widely used strategy for change, although it is also deemed one of the most difficult to fundraise for.

Political advocacy is the most widely used strategy for change, although it is also deemed one of the most difficult to fundraise for. Other popular approaches include *research & evidence-sharing* and *movement-building*.

Geographically, 77% of the CSOs' combined expenditure is allocated to work in the UK, where the majority of CSOs work across at least two levels (national, regional or local). One quarter of respondents work in all four UK home nations at the national level.

Brexit and Covid-19 have necessitated changes to operational and programmatic expenditure for some,

for instance investment in advocacy towards new UK environmental regulation, and the development of digital fundraising during the pandemic.

Improving impact

Our 116 respondent organisations differ widely in their size, focus and strategy, but they broadly agree on what the sector needs to deepen its impact. In particular, they want to see increased capacity for alliance building, network organising and community engagement, underpinned by more sophisticated communications and better performance on diversity, equity and inclusion.

Low salaries in the sector are seen as a barrier to recruiting appropriately skilled staff, while competition for funding and profile is still seen as a barrier to better collaboration.

Respondents also emphasise political advocacy, public campaigning and the promotion of broader societal debate (for instance, to rethink concepts of economic growth) as strategies to prioritise for further investment. Low salaries in the sector are seen as a barrier to recruiting appropriately skilled staff, while competition for funding and profile is still seen as a barrier to better collaboration.

The need to collaborate more and communicate better has been a running theme throughout the two previous editions of this survey. Around 80% of the 116 respondents say the sector's communications have improved since 2017. A similar percentage say the same of its ability to collaborate effectively. However, only one in three rate overall quality of communications or collaboration as good. Respondents also agree that the sector has a long way to go in improving its performance on diversity, equity and inclusion, although many are actively developing policies and practices to make progress at the organisational level.

Successes and failures

Asked about the sector's greatest successes over the last few years, respondents credit new social movements with embedding concepts of climate and nature crisis firmly in the public psyche and political rhetoric. The momentum behind rewilding is also cited as a success, along with evidence of practical behaviour change by members of the public. This has all served to reinforce the sector's legitimacy and advance its policy agenda.

The cementing of a 'net zero by 2050' target into UK law is seen as a big accomplishment, along with gains secured regarding the structure and content of post-Brexit environmental regulation. However, some respondents worry that hard-fought policy progress may be let down by weak interpretation and implementation. Some see failure in the sector's inability to hold decision-makers to account, and urge environmental groups to 'be bolder' in calling out the gap between rhetoric and reality.

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The RSPB, ClientEarth and the Wildlife Trusts were ranked as the most effective UK environmental groups by their peers. Extinction Rebellion and Greenpeace rounded out the top five, followed by Friends of the Earth and Green Alliance, whose Greener UK unit (and the coalition it represents) was widely admired for its work on post-Brexit policy.

Messages to funders

Asked what philanthropic funders could do differently in their support of the environmental sector, some respondents reiterate asks that civil society groups have often made of funders before – notably the need for more unrestricted, long-term support, and for more flexible grant making and impact evaluation processes.

There are several messages about how funders can deepen collaboration between environmental groups, by making more time and money available to do it well, and even to proactively facilitate or broker collaborations themselves.

Respondents want funders to help get more money into the sector, by scaling up their own spend and helping to recruit new donors.

Other messages touch on questions about effective allocation of scarce philanthropic funding, for instance how it is divided between work that addresses the symptoms versus the causes of environmental harm, and among different types of civil society groups. Respondents also want funders to help get more money into the sector, by scaling up their own spend and helping to recruit new donors.

Introduction and Methods

This report summarises findings from the Environmental Funders Network's third survey of UK environmental groups, following two earlier surveys conducted in 2017 and 2013.

What the Green Groups Said is the most comprehensive attempt to 'take the pulse' of the UK environmental sector. By collecting data and opinions from a wide range of environmental civil society organisations (CSOs), the series provides insight relating to their priorities, strategies and financial health, and acts as a source of collective intelligence on what their leaders perceive as the sector's key challenges, opportunities and funding gaps. This research into the 'demand' side of the funding market complements our *Where the Green Grants Went* publication series, which documents the 'supply' of funding from UK-based foundations and lottery sources for environmental work.

What the Green Groups Said is a key part of EFN's listening strategy – a means for the sector to communicate its needs, ideas and advice back to the funding community. We will work with our members to take stock of the insights arising from this report, and consider how philanthropic funders can become more effective supporters and partners of environmental groups.

> **We received responses from 116 organisations, including many of the UK's biggest environmental charities and many more smaller CSOs focused on specific issues or places.**

The survey was distributed to 450 environmental CSOs, including all those that responded to the previous surveys, plus the largest CSOs by income and others selected to represent the sector's full breadth in terms of organisational size, focus and strategy. The survey was open between July and September 2021, and received 116 responses in total. Our respondents include many of the UK's biggest environmental charities and many more smaller CSOs focused on specific issues or places.

We are grateful to everyone who took time out of busy schedules to complete the survey, and hope the results are as valuable to their own organisations as they are to funders. We welcome feedback on the topics raised in this report at info@greenfunders.org.

Please see the appendices for a full list of the survey questions, the thematic issue categories used to describe the focus of respondents' work, and the names of all CSOs that completed this survey.

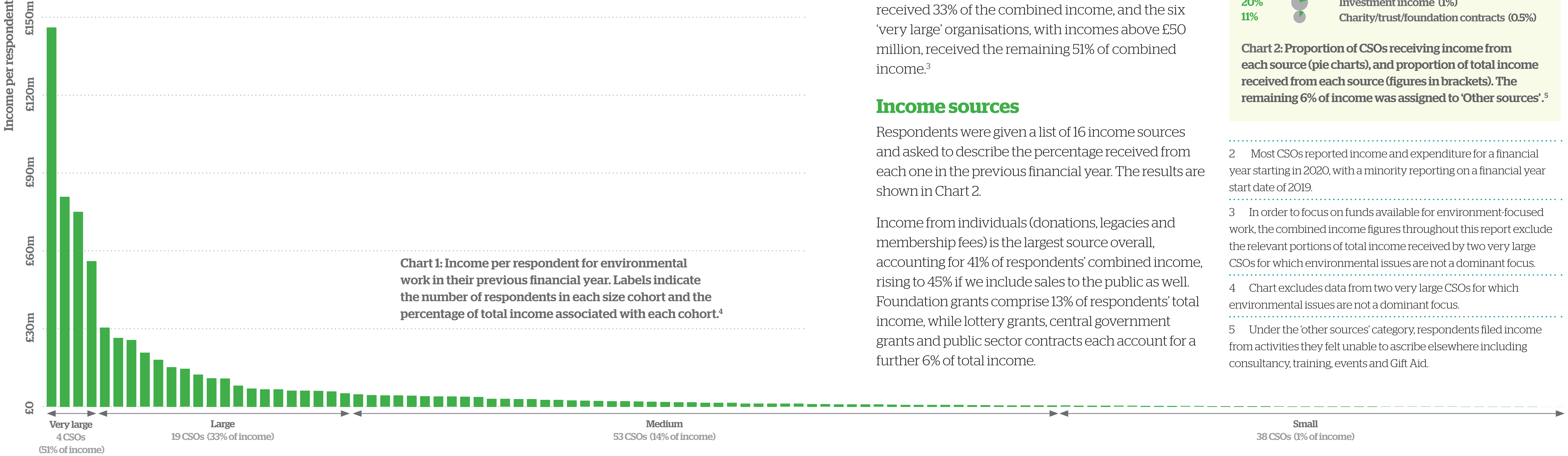

Chart 1: Income per respondent for environmental work in their previous financial year. Labels indicate the number of respondents in each size cohort and the percentage of total income associated with each cohort.[4]

1 Income: how environmental groups generate their funds

The 116 CSOs responding to the survey reported a combined income of nearly £730 million for environmental work.[2] This is lower than the £1 billion worth of income reported by the 92 CSOs that answered our 2017 survey, while the median income per respondent dropped from £2 million in the last survey to just under £1.2 million.

Only 43 organisations completed both surveys which limits the like-for-like comparisons that can be made, and the falls in total and median income may reflect a change in the profile of respondents, rather than sustained declines in the incomes of individual environmental groups. As we will see below, many respondents actually increased their incomes in the last two years, although the 43 CSOs that took part in both surveys have seen their combined income decline by 7% in real terms.

Breaking down the 116 CSOs into income bands or cohorts (see Chart 1), we see that nearly eight in ten are 'small' or 'medium' sized organisations. For the purposes of this report, these are classified as having incomes of up to £500,000 and £5 million, respectively. Together, these 91 organisations received 15% of the combined income reported by survey respondents. The 19 'large' organisations, with incomes between £5 million and £50 million, received 33% of the combined income, and the six 'very large' organisations, with incomes above £50 million, received the remaining 51% of combined income.[3]

Income sources

Respondents were given a list of 16 income sources and asked to describe the percentage received from each one in the previous financial year. The results are shown in Chart 2.

Income from individuals (donations, legacies and membership fees) is the largest source overall, accounting for 41% of respondents' combined income, rising to 45% if we include sales to the public as well. Foundation grants comprise 13% of respondents' total income, while lottery grants, central government grants and public sector contracts each account for a further 6% of total income.

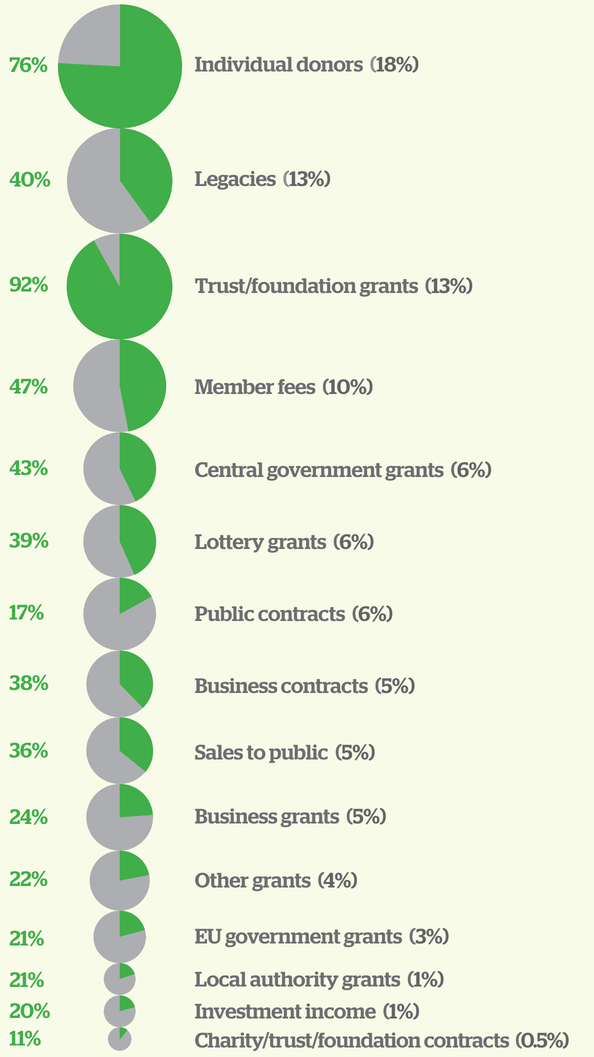

Chart 2: Proportion of CSOs receiving income from each source (pie charts), and proportion of total income received from each source (figures in brackets). The remaining 6% of income was assigned to 'Other sources'.[5]

2 Most CSOs reported income and expenditure for a financial year starting in 2020, with a minority reporting on a financial year start date of 2019.

3 In order to focus on funds available for environment-focused work, the combined income figures throughout this report exclude the relevant portions of total income received by two very large CSOs for which environmental issues are not a dominant focus.

4 Chart excludes data from two very large CSOs for which environmental issues are not a dominant focus.

5 Under the 'other sources' category, respondents filed income from activities they felt unable to ascribe elsewhere including consultancy, training, events and Gift Aid.

Breaking down income sources by organisational size reveals a more varied story. Individual donations, legacies and membership fees are indeed the largest sources for our 'large' and 'very large' respondents (who received 36% and 49% of income, respectively, from these sources combined). However, 'medium' and 'small' CSOs received a much smaller proportion of their income from these sources (22% and 19%), perhaps because they are less able to access large numbers of individuals as donors or members. These groups rely much more heavily on grant income, particularly from foundations, whose grants comprise 57% of all income received by 'small' CSOs, and 29% of that received by 'medium' CSOs. Foundation grants make up a smaller proportion of income for 'large' and 'very large' CSOs (20% and 2%, respectively).

While trust and foundation grants are relatively more important to smaller organisations, the majority of grants by value accrue to larger CSOs. In total, 62% of the foundation grant funding recorded in this survey went to the 25 CSOs with incomes above £5 million, and 38% to the 91 with incomes less than this.

Most respondents received income from two to six of the 16 categories shown in Chart 2. On average, CSOs with incomes above £5 million had nine types of income source, compared to an average of five for organisations smaller than this. Foundation grants are the most widely received source, with more than 100 CSOs reporting some income in this category.

Staffing and volunteers

The 116 respondent CSOs have a total of 9,294 paid full-time equivalent (FTE) staff working on environmental issues. More than eight in ten of all paid staff work in 'large' and 'extra large' organisations, which average 145 and 855 staff each. At the other end of the scale, the 43 'small' CSOs have an average of 3.6 FTE staff per organisation, dropping to 1.4 FTE among the 14 CSOs with incomes of less than £100,000.

Respondents also reported nearly 100,000 unpaid volunteers working on environmental issues, with five CSOs accounting for 70% of all volunteers. Groups that undertake practical conservation or other place-based environmental enhancement work generally have the most volunteers.

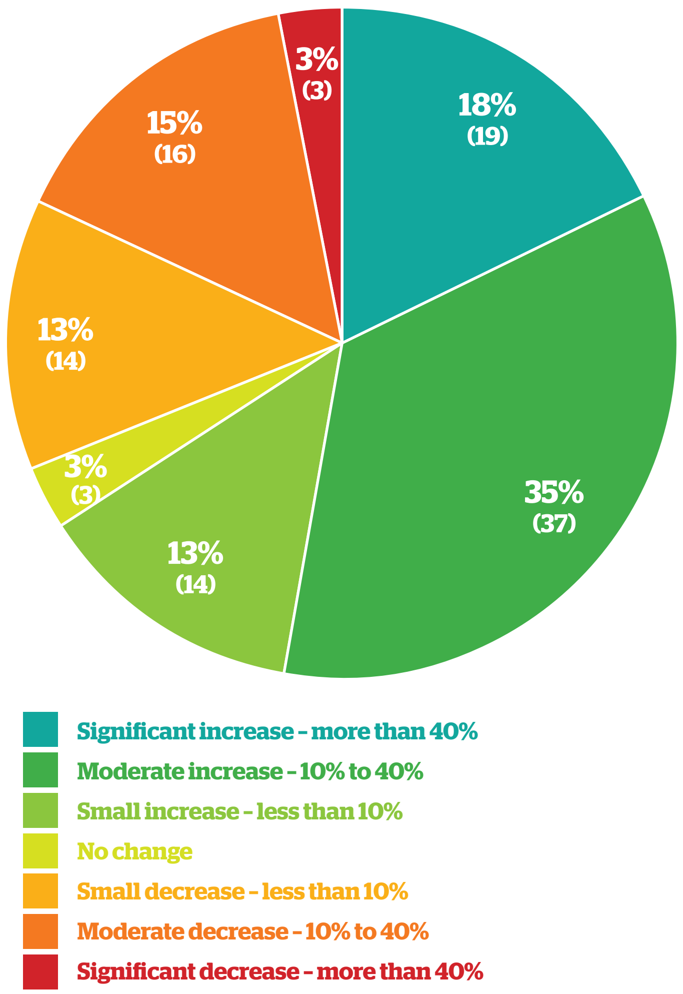

Chart 3: Changes to respondents' overall income level in the last two years. Labels indicate percentage of respondents (number of respondents shown in brackets).[6]

Impacts of Coronavirus and Brexit

UK environmental groups have long been concerned about how Brexit will impact their incomes as well as the political context for their work. In the 2017 edition of this survey, nearly two thirds of respondents expected to lose funding due to Brexit. Then, as now, direct EU government grants made up a small fraction of total reported income (2% in each survey). However, CSOs have also lived with uncertainty about how Brexit will affect the structure of UK government funding programmes, the preferences of trusts and foundations, and the health of the wider economy.

As it was, the UK's departure from the EU on 31 January 2020 fell on the same day as the country's first cases of Covid-19 were confirmed. While many CSOs have continued to do vital work regarding Britain's future policy and regulation (as discussed in Sections 2 and 5), coronavirus eclipsed Brexit in frontline politics and news headlines, and became a compounding and often more pressing issue for CSOs to attend to.

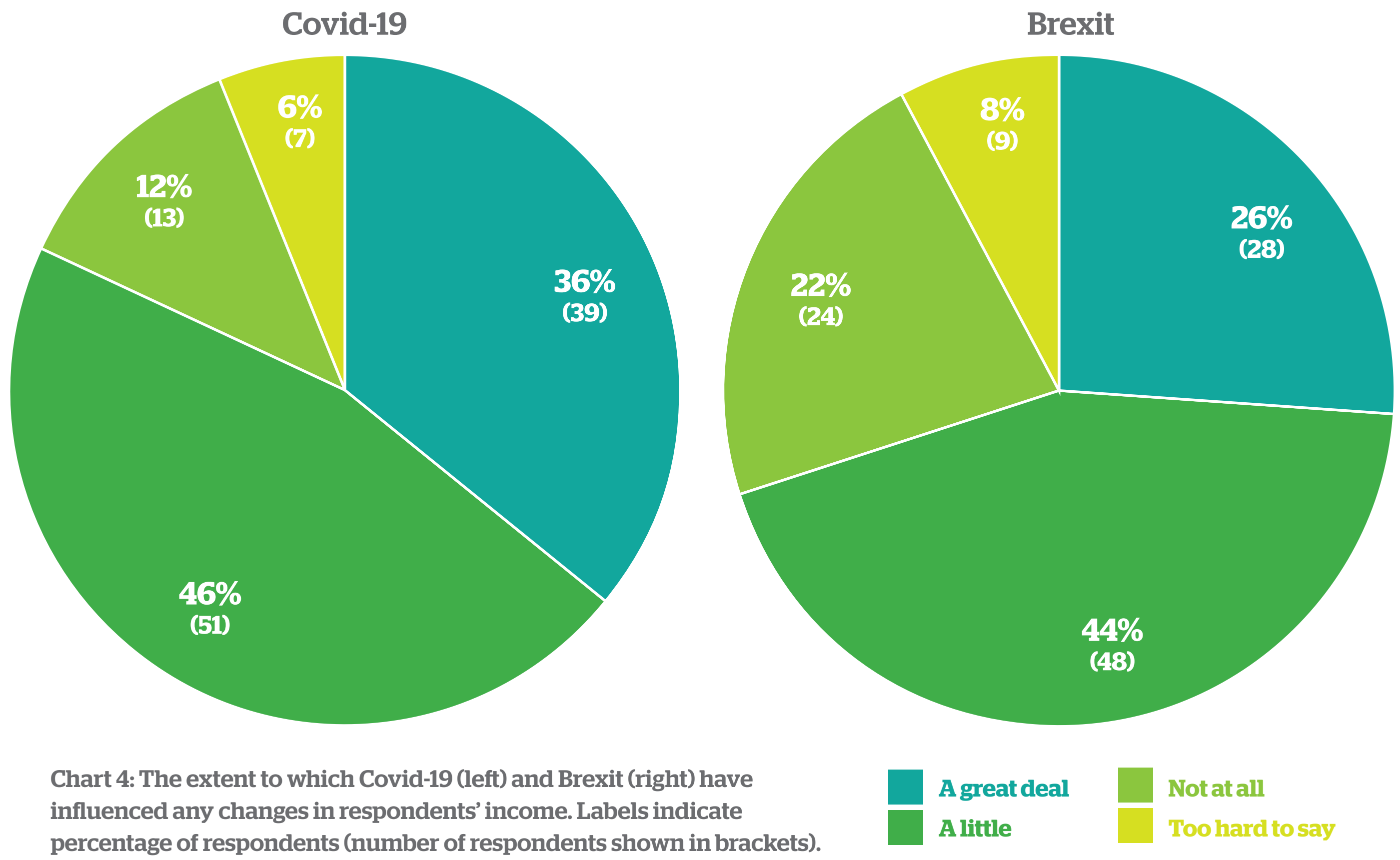

Chart 4: The extent to which Covid-19 (left) and Brexit (right) have influenced any changes in respondents' income. Labels indicate percentage of respondents (number of respondents shown in brackets).

The pandemic had a significant impact on many respondents' operations, entailing cancelled projects and events, additional IT costs, staff absence and low availability of volunteers.

However, around six in ten managed to increase their organisational incomes over the last two years, with most of these recording rises of at least 10% (Chart 3). It may be that the income falls predicted earlier in the pandemic have not been fully borne out[7] – or at least not yet, among this sample of CSOs.[8]

Individual giving and foundation grants are the most mentioned variables influencing how well organisations have weathered the storm. Many CSOs also accessed the government's furlough scheme, which was a substantial (if time-limited) help to some; on the other hand, those who said anything about income from corporate partnerships reported this had all but dried up.

> ***'We were pleasantly surprised that income from individuals rose as people valued nature and its benefits to physical and mental health during lockdown.'***
>
> ***'Income benefited slightly from people having more spare cash, we believe, increasing donations.'***
>
> ***'In the short term, individual giving remained strong, however new member recruitment was curtailed, with longer term consequences on our finances.'***

Private philanthropy clearly made a difference in helping some organisations through Covid-19, via emergency or extended grants. Some respondents, however, were dropped by funders diverting resources to the front line of the crisis, or were given extensions without extra funds.

> ***'One-off unrestricted grants from two long-term donors shielded us from the worst of Covid-19.'***
>
> ***'It was thanks to the generosity of a small number of major donors that we survived.'***
>
> ***'Many funders closed their doors during Covid, or changed their priorities to be people-focused rather than environment-focused.'***
>
> ***'We had to extend our end dates but didn't receive additional funding from donors to do this.'***

6 Respondents were asked to describe income change in the past two years due to any factor, not just Covid-19 and Brexit.

7 Wildlife and Countryside Link (2020). 'Environment and Conservation Organisations - Coronavirus Impact Survey Report': https://www.heritagefund.org.uk/sites/default/files/media/attachments/Coronavirus%20eNGO%20survey%20analysis%20report_1.pdf.

8 We caution that these results may suffer from a selection bias, if for instance organisations in greater financial difficulty were less likely or able to complete the survey.

Brexit has been less consequential for respondent CSO incomes than coronavirus (Chart 4). Overall, three in ten say that Brexit has affected their income, fewer than those who say it has not influenced it at all, although some respondents think the full repercussions will only unfold with time. As one puts it, 'I'm not sure we are far enough away to assess the changes as yet'.

Although EU grants make up a small fraction of total CSO income reported in this survey, losing these funds is a substantial concern for groups that rely on them. There is also criticism about a lack of 'timely, detailed' information on what large-scale, multi-year funding structures will be set up to replace EU schemes such as the LIFE programme, and scepticism that these will be equally as generous or good, with one respondent giving a particularly vivid example from Scotland.

> ***'40% of our income was from the EU, and replacements look to be very pale imitations [and/or] extremely unclear.'***
>
> ***'Scotland was awarded over 21% of all EU LIFE funds allocated to the UK on average, significantly above any Barnett Formula, and making possible transformational landscape-scale projects in combination with other funders too. Currently there is no firm [replacement for] EU LIFE for Scotland or the UK.'***
>
> ***'Brexit hasn't reduced our existing income, but has made it harder for us to expand work in EU countries, which is one of our main strategic goals.'***

Meanwhile, 41 groups say that Brexit has influenced their expenditure. Around half of these have spent more on advocacy since it became clear that the UK would need to create a separate policy and governance regime to the European Union. These CSOs include larger groups working on agriculture and land use policies in particular, and smaller ones that specialise on issues including trade policy, genetically modified organisms and chemicals.

For some, Brexit has necessitated investment in new offices and staff capacity, in order to maintain work on UK and EU policy at the same time. Brexit has impacted a wide range of other operations too, from concerns about retaining EU nationals on UK-based staff teams to supply chain difficulties affecting merchandise sales and building projects.

> ***'We've received grants to work on maintaining environmental protections post-Brexit and hired staff to do this work.'***
>
> ***'We have had to increase our UK work trying to stop the deterioration of existing policy.'***
>
> ***'We have increased our policy resources as the devolved nations seek to implement new legislation and regulations.'***
>
> ***'Brexit has resulted in us having to duplicate policy work to try to cover issues at both an EU and UK level. This has resulted in increased costs.'***

Asked to describe their organisation's current state of financial health, two thirds of respondents say it is 'good' or 'very good'. Most of the rest rate it as 'moderate', with only two CSOs saying it is 'poor'. Organisations in our 'small' income cohort report slightly lower levels of financial health than larger ones.

This relatively upbeat assessment only applies to the CSOs that took our survey and cannot be extrapolated to the sector as a whole. Among our respondents, even those in good financial health generally regard this as a temporary status that could quickly deteriorate. As one describes it, 'we live with ongoing insecurity', with this attributed at least in part to funder preferences for short-term project grants rather than long-term unrestricted funds (see Box 1).

Box 1: Core and unrestricted funds still in short supply

Previous EFN sector surveys have reported calls for funders to provide more core and unrestricted support. But are these grants actually getting any easier to come by?

When we put this question to respondents, 45% reported 'no change' in the ease or difficulty of accessing core or unrestricted funds. Of the rest, over a third (36%) say it is becoming 'harder' or 'much harder' to source this type of funding, while one fifth (19%) say it is 'easier'.

Factors making it easier for respondents to source core or unrestricted funds include coronavirus, which has led some funders to relax restrictions, although CSOs are doubtful about how long this will last. The climate and biodiversity crises are also credited with driving an increased willingness to provide core or unrestricted funding.

CSOs that are finding it harder, or at least no easier, to access this type of funding generally did not elaborate on why this might be the case, though some link it to funders' desire to demonstrate their own strategic impact.

Respondents are aware of attempts within the funding community to increase access to unrestricted funds, although one characterises this as 'a lot of chatter but no real change'. Although conversations about the importance of core and unrestricted funding have been going on for many years, it seems there is still much room for improvement – from the perspective of grantseekers, at least.

> ***'We rely on constant fundraising to keep going.'***
>
> ***'We have difficulty funding back-office functions (core costs) – the supporting structure that is needed to make the movement strong and sustainable.'***
>
> ***'Private and corporate philanthropy are typically unrestricted in name, but in practice are shifting towards restriction by having increased impact requirements.'***
>
> ***'In the pandemic, funders realised the need to be flexible and meet organisations at their needs rather than prioritising their own criteria.'***

2 Expenditure: how environmental groups spend their funds

The 116 respondent CSOs reported a combined expenditure of nearly £673 million on environment-related work in their previous financial year.[9] At £5.8 million, the mean expenditure per respondent is well above the median of just over £1 million, i.e. the average is skewed by a small number of organisations with very large expenditures, as in the case of incomes. The highest spending by a single CSO was over £127 million; at the other end of the scale, 17 CSOs had expenditures of less than £100,000, including two that recorded zero income in the financial year starting in 2020.

Expenditure by thematic issue

Respondents were given a list of issue categories (described in Appendix 4) and asked to estimate what percentage of their expenditure went to each one. The results are shown in Chart 5.

While the results are not necessarily representative of issue priorities across the environment sector as a whole, a few broad trends are worthy of note. Altogether, the three main nature conservation categories (*biodiversity & species preservation, terrestrial ecosystems, coastal & marine ecosystems*) account for 51% of all expenditure, almost four times the 13% of spending in the three categories most closely associated with work on climate change (*climate & atmosphere, energy* and *transport*).

The share of conservation-related spending by the 116 respondents was slightly lower than that reported in the 2017 survey, when 60% was invested across the three categories; while the share of climate-related spending has slightly risen, from less than 10%. However, only 43 organisations answered both surveys, so it is hard to draw firm conclusions about shifting organisational priorities.

The 13% share of spending on climate change work excludes what is likely to be a growing portion of climate-related spend in other categories, as issues like *sustainable communities, terrestrial ecosystems, agriculture & food* and others are recast to include at least a partial climate focus.

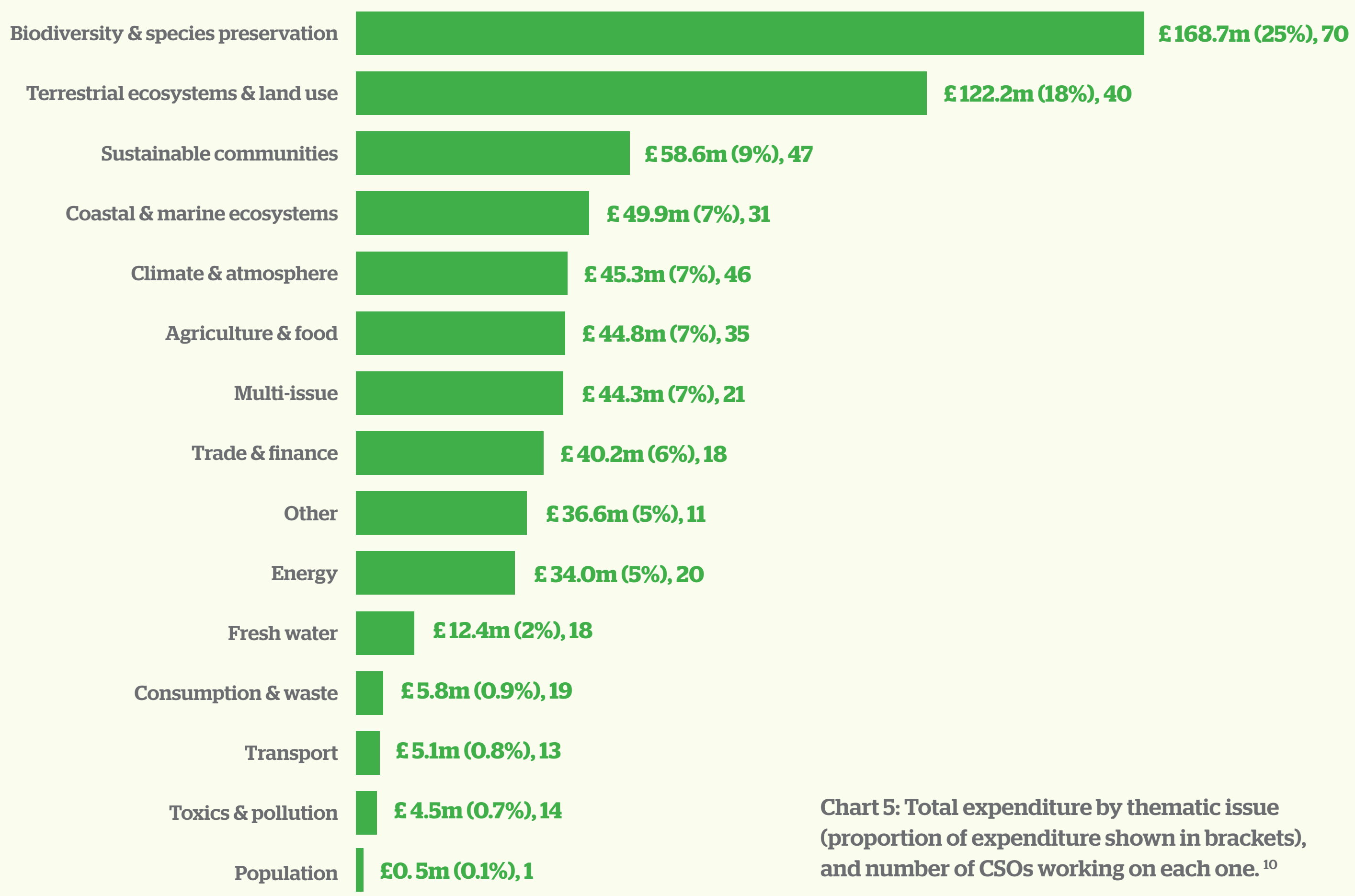

Chart 5: Total expenditure by thematic issue (proportion of expenditure shown in brackets), and number of CSOs working on each one. [10]

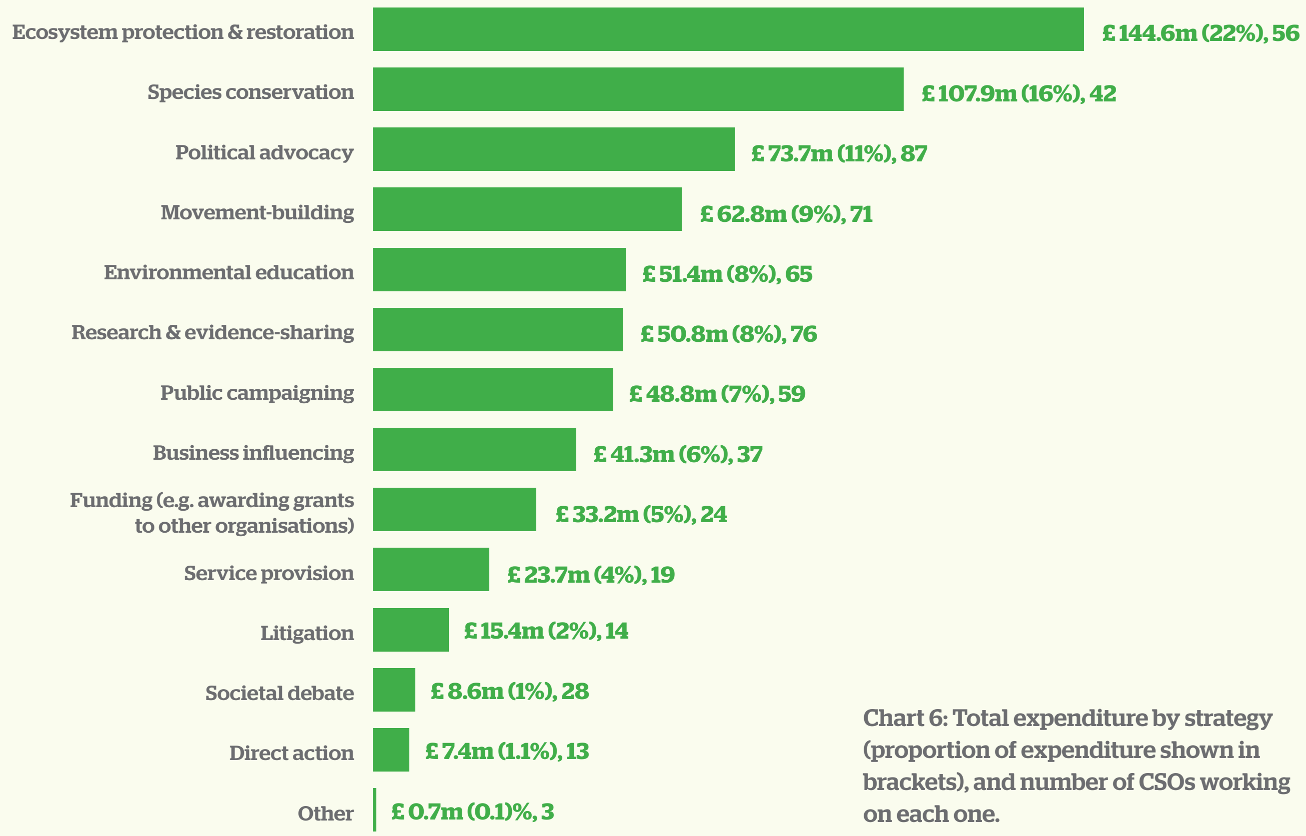

Chart 6: Total expenditure by strategy (proportion of expenditure shown in brackets), and number of CSOs working on each one.

Some issue categories continue to attract only very small shares of expenditure, despite including key drivers of environmental harm. This reflects trends in UK foundation and lottery funding tracked through our *Where the Green Grants Went* series, which refers to a set of four 'Cinderella issues' that receive very little funding: *transport, trade & finance, toxics & pollution* and *consumption & waste*.[11]

In terms of numbers of CSOs working on each issue, *biodiversity & species preservation* is the most popular category, with 60% of all respondents allocating at least some expenditure to this, followed by *sustainable communities* and *climate & atmosphere*.

There are some differences between income cohorts in terms of how they allocate expenditure across thematic issues. On average, 'small' CSOs (incomes less than £500,000) direct less of their spend to conservation issues compared to all other income cohorts. Conversely, they allocate a slightly greater than average share of expenditure to climate issues, and also to 'Cinderella' topics like *toxics & pollution*.

Expenditure by strategy for change

The strategies used by respondents to achieve change are shown in Chart 6.[12] *Political advocacy* is the most common approach, employed by more than seven in ten CSOs, followed by *research & evidence-sharing* and *movement-building*, which are each used by around six in ten CSOs.

Ecosystem protection & restoration and *species conservation* account for the largest share of respondents' combined expenditure, at 22% and 16% respectively, with half the CSOs using one or both of these strategies. These two strategies attract the highest expenditure in all income cohorts with the exception of 'small' organisations (incomes up to £500,000), for whom *movement-building* and *political advocacy* attract the greatest shares of spending (at 23% and 18%, respectively).

Litigation, societal debate and *direct action* are the strategies receiving the lowest share of expenditure, although the emphasis on *societal debate* appears to increase moving from larger to smaller CSOs (with roughly one in three 'small' CSOs recording some level of activity in this area, compared to one in five 'large' or 'very large' CSOs).

9 The respondents included a couple of very large organisations that direct the majority of their expenditure to non-environmental issues. This portion of their expenditure is excluded from our analysis, in order to focus on funds available for environment-related work only.

10 23 CSOs allocated at least part of their expenditure to the 'other' category. Where this was ascribed to operational expenses like fundraising, we have re-allocated the expenditure across the thematic categories they work on.

11 https://www.greenfunders.org/where-the-green-grants-went-8/

12 These strategies are described more fully in the original survey questions in Appendix 1 (Q21).

Box 2: Issues and strategies that CSOs find more difficult to fundraise for

Around half of respondents name at least one issue they find especially difficult to fundraise for. Mostly, these relate to themes their organisations already work on, so conservation and climate-related topics rank highly on the list. However, *agriculture & food, trade & finance* and *toxics & pollution* all rank more highly in the 'hard to fundraise' list than they do in the ranking of existing CSO spending, suggesting a desire to increase work effort in these areas if funding allowed.

Similarly, the three most widely used strategies for change are also deemed the hardest to raise funds for: *political advocacy, research & evidence-building*, and *movement-building*, along with *public campaigning*. Advocacy, in particular, is an approach that EFN research has consistently highlighted as a fundraising challenge.

In their comments, respondents of various sizes say it is easier to fundraise for projects with tangible outcomes, than for work directed at more systemic change. As in other parts of this survey, respondents differentiate between the ease of raising core and project funds.

> *'It's surprising that donors still favour local projects like beach cleans over systemic change at scale to address the two biggest challenges we face in the ocean – loss of biodiversity, which exacerbates climate change. It's not that we can't raise money for them, but it's harder than it should be, given the urgency of the situation.'*
>
> *'Policy work that supports vital systemic change is the most difficult fundraising area.'*
>
> *'As a network, none of our work is on-the-ground. It is fairly difficult to fundraise for coordination work on just about every topic, aside from a few trusts that know this is important.'*

Expenditure by geography

The breakdown of respondents' expenditure by geographic level is shown in Chart 7. Over three quarters (77%) of their combined spending stays in the UK, where the majority of CSOs work across two or more levels (national, regional or local).

Most of the remaining 23% of expenditure that supports international work is associated with the 37 CSOs working in countries outside the UK and EU (18.5% of the total). By contrast, work targeted on EU institutions or member states only attracts 2.4% of expenditure, across a total of 27 CSOs that direct at least some of their work effort to one or both of these levels.

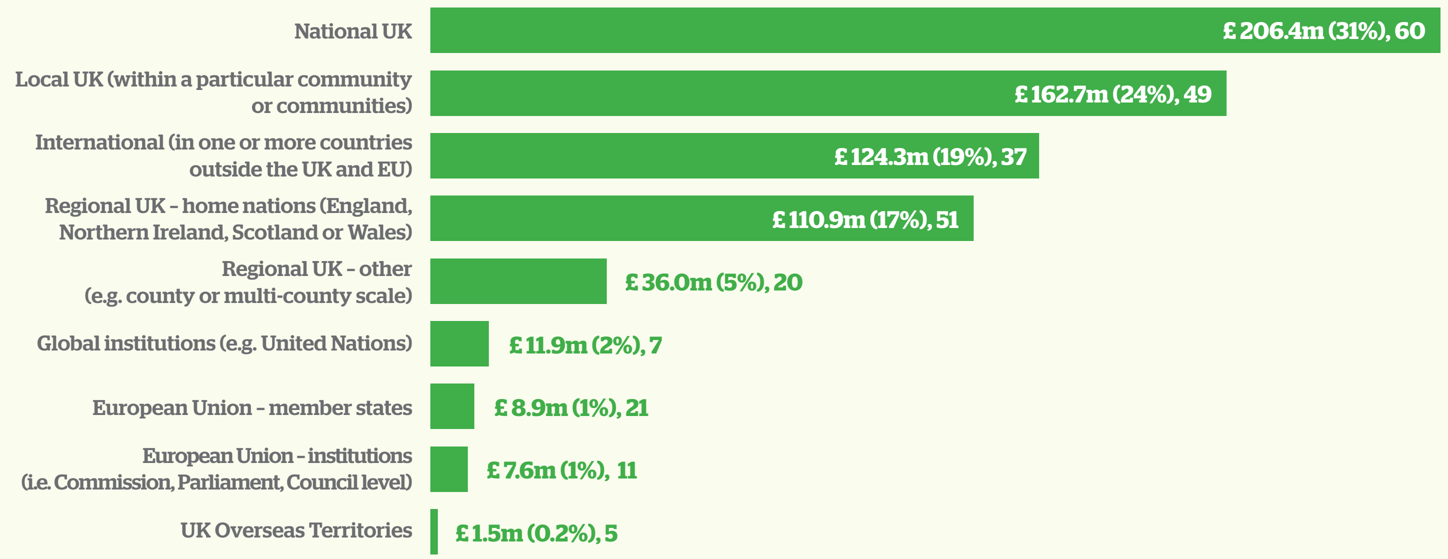

Chart 7: Total expenditure by geographic level (and proportion of expenditure), and number of CSOs working at each level.

Box 3: Work within the UK home nations

Respondents who work partly or wholly in any of the four UK nations were asked to describe the geographic focus of that work, with 'national' taken to mean within the home nation in this context (especially work focused on the devolved governments in Belfast, Cardiff and Edinburgh) rather than across the entire UK. The results are shown in Chart 8.

At each geographic level, England has the greatest capacity in terms of CSO numbers and Northern Ireland the lowest. This reflects the geographic base of our respondents, and also the reality that England has many more voluntary organisations than other home nations.[13]

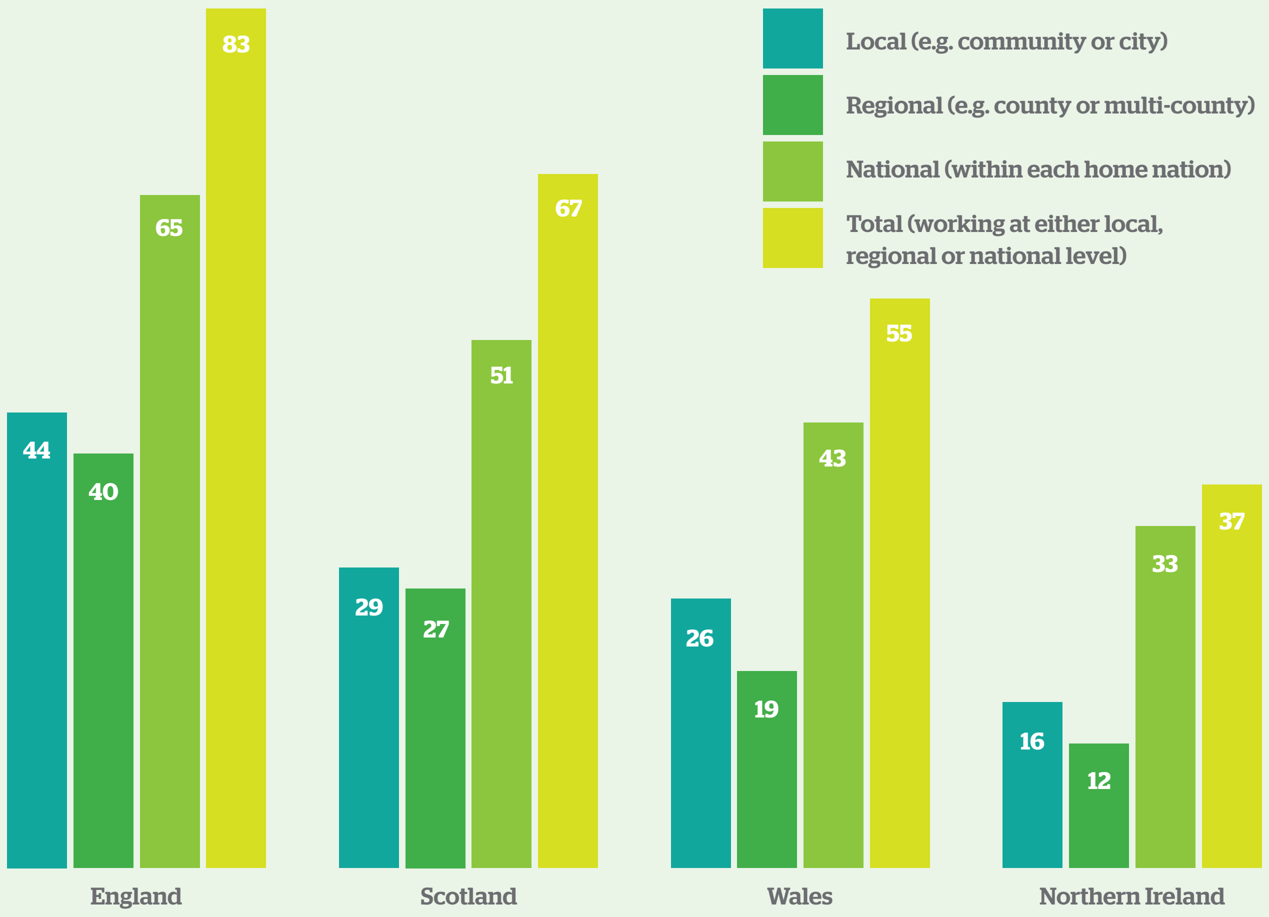

Chart 8: Number of CSOs working at different geographic levels within each home nation.

One quarter of respondents (28 CSOs) work in all four home nations at the national level. These range from small organisations that specialise on issues like agriculture, chemicals and waste, to large advocacy, campaigning and conservation groups. It will be interesting to see how civil society engagement with the UK's devolved administrations changes in response to a post-Brexit policymaking landscape; the Environment LINKs family of networks is already helping CSOs to gain a 'proper four nations perspective', according to one of its members.

Some respondents see a need to build or maintain a sub-national presence in each nation, too, working with metro mayors and local authorities. One has set up devolved leadership groups that work at national, county and community level in each UK nation. It will not be easy (or cheap) for CSOs to develop additional capacity for joined-up work across various levels of government; one respondent describes devolution simply as 'a major complicating factor for UK organisations'.

13 Of the 163,000 voluntary organisations recorded by NCVO's 2021 UK Civil Society Almanac (in many sectors, not just environmental), over 129,000 are based in England: https://blogs.ncvo.org.uk/2021/09/29/ncvo-almanac-2021-voluntary-sector-findings/.

3 Improving impact: priority skills and strategies for change

We asked respondents to rank which skill sets and areas of expertise are in most need of development over the next few years, at an organisational level and for the sector overall.

The results show strong agreement on what the sector's priorities should be; the top three ranked skill sets (see Chart 9) relate to more collaboration and more movement-building overall, augmented by more sophisticated communications. Better performance on diversity, equity and inclusion completes the top four.

Respondents returned a similar ranking when asked to prioritise the skills they need more of as individual CSOs, albeit with greater emphasis on policy expertise, fundraising and other aspects of organisational development. Digital transformation also came up repeatedly as a skills gap to be filled, particularly in relation to marketing and fundraising.

Respondents still place considerable emphasis on the 'tool kit' more traditionally associated with environmental policy success, such as political, economics or legal expertise. But in terms of where the sector needs to acquire and build skills, these are deemed a lesser priority than increasing reach and strengthening collaborations – investments which should, in turn, strengthen the base from which to influence decision-makers.

> *'Movement-building and mobilising grassroots action seems the most important and too often neglected aspect of environmental campaigning.'*
>
> *'Societal shifts and changing norms are key. The rest will follow.'*

We also asked CSOs which strategies they think the sector should do more of in order to increase its effectiveness (Chart 10). The emphasis on strategies for movement-building, public campaigning and societal debate reflects the priority placed on acquiring skill sets around network organising, community engagement and communications (see Chart 9). Political advocacy tops the list of strategies to do more of – ranking higher than it does in the list of most-needed skill sets. The difference may be because respondents think the sector already has good skills in this area, but needs to increase the volume and reach of its advocacy overall.

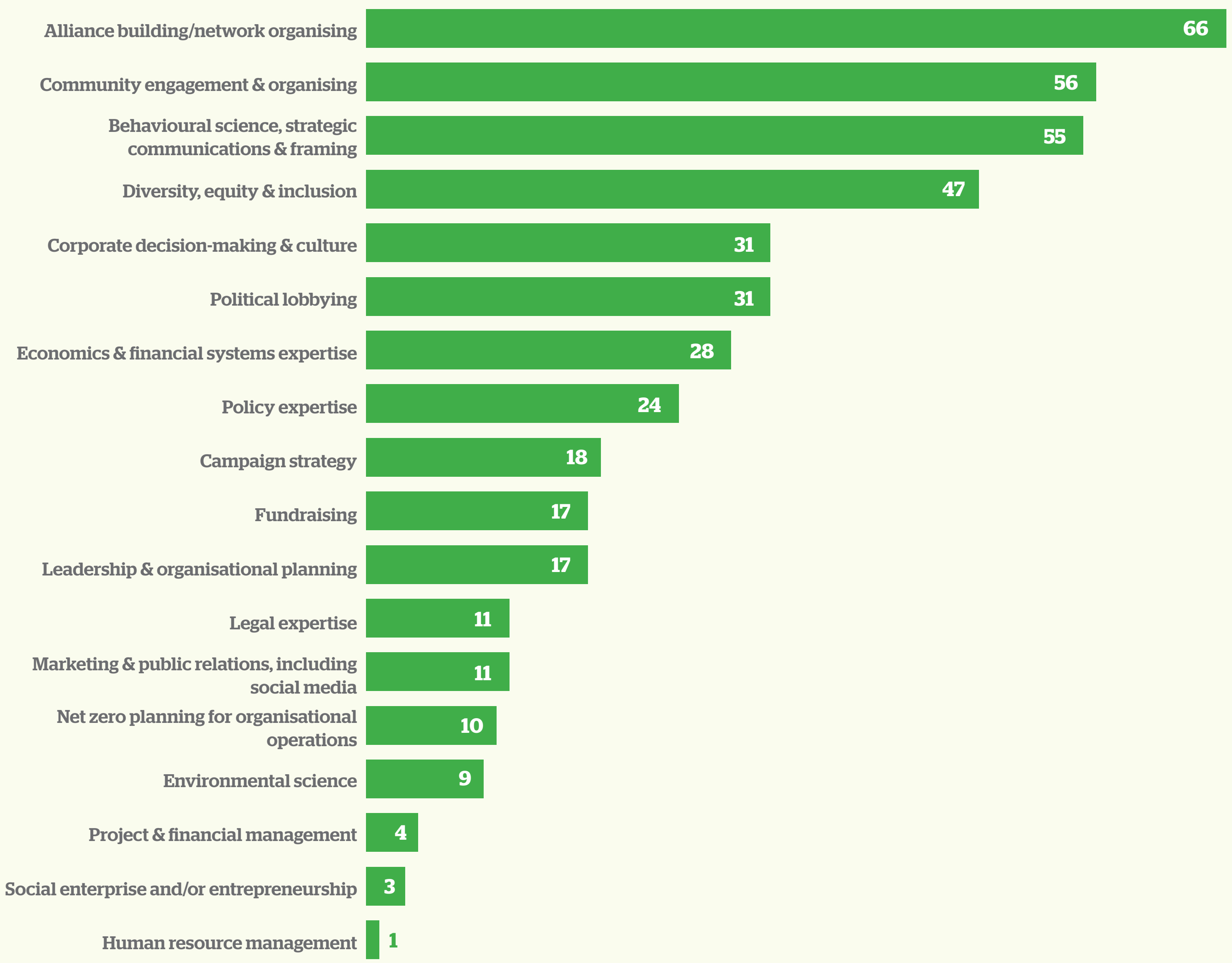

Chart 9: Skill sets that respondents think UK environmental groups most need to invest in over the next few years (labels indicate the number of times each skill set received a ranking between #1 and #5).[14]

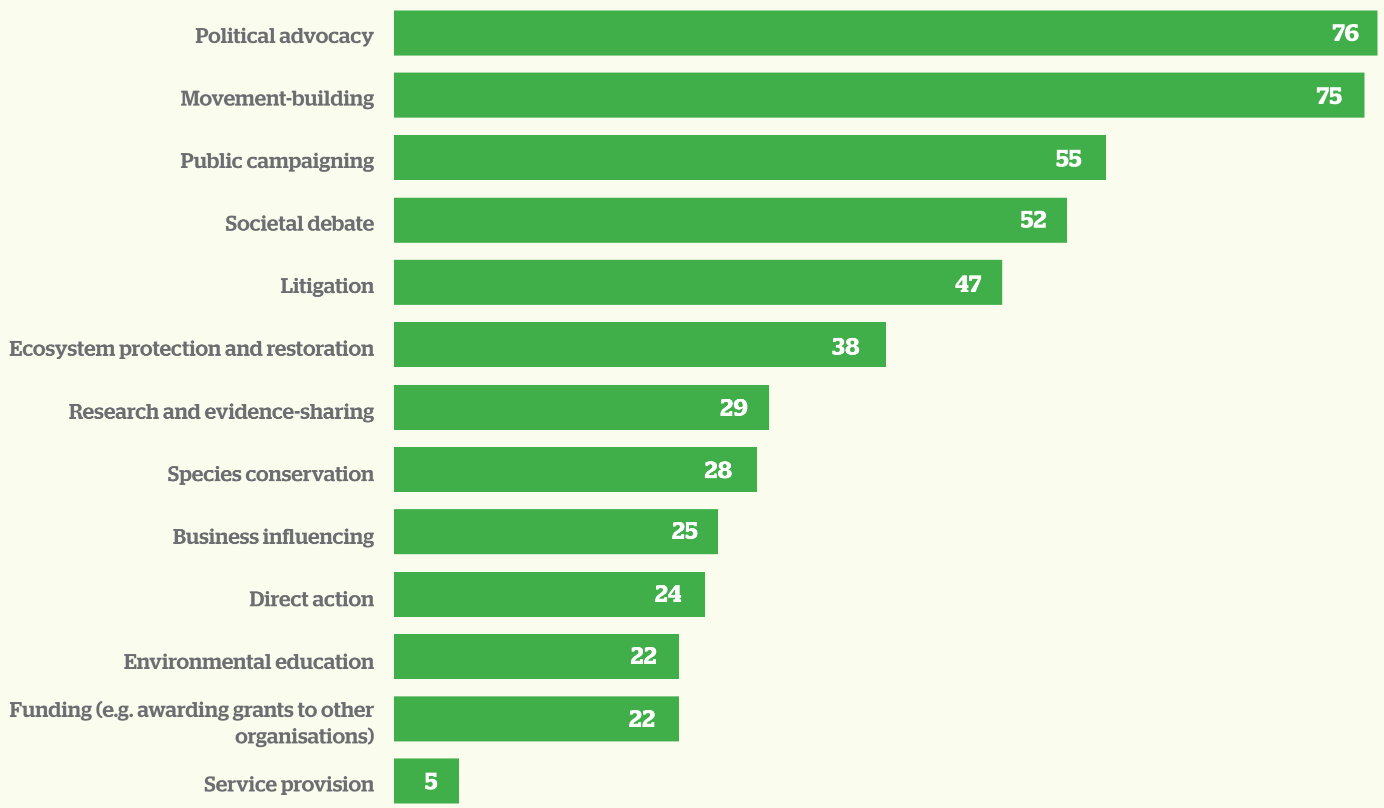

Chart 10: Strategies that respondents think UK environmental groups should do more of to increase the sector's effectiveness (labels indicate the number of times each strategy received a ranking between #1 and #5).

14 The same skills at the top of this list also take the first four places if we only count rankings #1 to #3.

Box 4: Why are some skills hard to acquire?

Asked what makes some skills especially difficult to acquire, respondents converged around a few main themes.

First, aspects of the sector's culture and structure are perceived as barriers to much-needed collaboration. Multiple respondents refer to competition for profile and funding; a few also named duplication and fragmentation as factors holding back success, with some also arguing for a greater division of labour among environmental groups.

Other EFN research suggests that trusts and foundations may be exacerbating these problems through a tendency to scatter grants thinly and widely[15] – a trend that surely contributes to fragmentation and relates to grantmakers' often-observed preference for seeking newness and innovation, at the expense of the long-term investment needed to build a stable base of effective CSOs. We return to this theme in Section 6.

> *'There are too many small and disconnected initiatives working in isolation. We need to align and aggregate expertise and resources across the sector.'*
>
> *'We need different environmental groups to concentrate on different areas, to keep progressing across the board.'*
>
> *'Working with communities and building alliances is hard for the culture of the NGO sector, which often works in the opposite direction – i.e. being too competitive.'*
>
> *'[All these skills are needed], but not all are needed in-house – building mutually beneficial strategic collaborations will be key.'*

Second, and perhaps more tangibly, is the challenge faced by many CSOs in attracting suitably qualified staff. This is seen as a key barrier to acquiring expertise in professions that pay more highly outside the environmental movement. This reflects the widely acknowledged 'non-profit starvation cycle', in which funders consistently underestimate what it costs to run civil society groups, and civil society groups conform to that expectation (and necessarily respond to it) by underinvesting in core operational costs including salaries.[16]

Meagre salaries feed into a third challenge that respondents identify in relation to improving diversity among the sector's staff base. A number of CSOs say they have strengthened recruitment practices, but are still failing to attract applicants from less privileged backgrounds. Salary levels are perceived as a contributing factor to this, alongside other barriers to inclusion which we explore more in Section 4.

> *'The sector struggles to keep pace with salaries that reflect the skill levels required to tackle the scale of the challenges we face.'*
>
> *'The sector is seen as a poor relation to professional careers [meaning] it is often not aspirational to want to work for an NGO.'*
>
> *'The sector isn't currently representative of society as a whole and still faces many fundamental internal barriers to developing a more inclusive space.'*

15 https://www.greenfunders.org/where-the-green-grants-went-8/

16 https://ssir.org/articles/entry/the_nonprofit_starvation_cycle

4 Improving impact: focus on collaboration, communications, diversity, equity and inclusion

The need to collaborate more and communicate better has been a running theme throughout the two previous editions of this survey. The last few years have seen environmental groups (and their funders) redouble efforts to improve performance in these areas; we asked CSOs to reflect on any headway being made. We also asked how well they think environmental organisations are addressing issues of diversity, equity and inclusion;[17] a particular priority for this sector as we explore below. All the themes covered in this section also came through strongly when we asked respondents what they would like the sector's leaders to do differently (see Box 5).

Communications

The majority of respondents say there has been 'moderate' improvement in the sector's communications since our last survey in 2017 (69%), with one in ten seeing a 'huge' improvement in how environmental groups communicate. More than half of respondents rate the overall quality of communications now as 'moderate' (58%), and another three in ten as 'very good'.

Newer social movements are credited with embedding the language of climate emergency in public, media and political discourse, though some respondents consider that longer-established groups prepared the ground for this.

> *'The want for change has grown exponentially. This can partially be attributed to the work of direct-action groups, most notably Extinction Rebellion, but this shift has its roots in the ongoing action of the environmental sector more broadly, where actors work tirelessly to influence policy makers, corporate decision makers and the mainstream media.'*
>
> *'Decades of groundwork by [the environment sector] enabled XR* et al *to springboard from those foundations.'*

Now, the challenge is to capitalise on heightened levels of concern. Several larger CSOs gave examples of how their communications teams have successfully used narratives of climate and nature crisis, or just transition, to advance their work. However, respondents say that the sector is still held back by poor communications habits, in particular a tendency to talk in jargon, not speak with 'one voice', and focus on existing audiences rather than new ones.

> *'We have a Tower of Babel problem with lots of different messages being fired off – there is not much evidence of increased alignment across the sector as a whole.'*
>
> *'We are much too focused on speaking to people "like us", and poor at reaching non-converted audiences or thinking through who good messengers might be.'*

We asked CSOs to tell us about anything that has helped to strengthen their communications skills. Freely available research, insight and training resources have proven useful, for instance the 'Britain Talks Climate' toolkit from Climate Outreach,[18] as has The Media Trust's climate communications programme, supported by the Garfield Weston Foundation.

While free resources are useful to a certain extent,, there is clearly no substitute for more funding. Organisations that have invested financially in communications work – commissioning audience insight projects, hiring external PR agencies or up-skilling their staff teams – are reaping the benefits. Some respondents quote examples of where dedicated funding for communications work has made a huge difference, such as enabling research to inform the development of communications strategies.

> *'You can't train someone up if they have no capacity to use it. This is a very real challenge when core staff are spread thinly across a wide range of activities.'*
>
> *'Investing in insights work (e.g. surveys and focus groups) has helped us hugely - to see what lands before designing comms strategy and assets.'*

17 See Appendix 1 for the definitions applied for the purposes of this survey (Q43-45).

18 https://climateoutreach.org/britain-talks-climate/

Collaboration

Most respondents think that environmental groups have become more effective collaborators since 2017, with six in ten seeing 'moderate' improvement, and another one in ten describing the improvement as 'huge' – though the same number see 'no' improvement. The sector's current performance on collaboration is generally perceived as 'moderate' or 'very good' (by 56% and 30% of respondents, respectively), although 7% rate it as 'poor' or worse.

The vast majority of our respondents are undertaking some level of collaborative activity. Many regularly work with partners beyond the environmental movement too; six out of ten say they 'often' or 'sometimes' collaborate with groups from other sectors. Well over 200 such relationships were reported in the survey, many within the broader third sector, where education and health organisations are the most frequent partners. Smaller numbers of respondents are also collaborating with local authorities, trade unions, landowners, churches, academia, the arts, and business sectors including farming, construction, banking and retail.

Within the sector, collaboration takes a multitude of forms. Some collaborations are short-lived and last only as long as a specific project or campaign. Others are ongoing forums for sharing information and ideas, which serve to maintain a level of preparedness for the next joint opportunity that comes along.

The Rethink Nature partnership between seven nature organisations is seen as a particularly strong example of collaboration in the UK conservation space, while advocacy-oriented coalitions like Greener UK, Wildlife and Countryside LINK and Scottish Environment LINK are widely valued by survey respondents for the convening and coordinating they do. Indeed, political developments frequently act as a catalyst for collaborative action, the cascade of post-Brexit environmental regulation being a case in point.

Respondents rate time inputs and relationship-building as the most important success factors, along with resources to support these. Because of the time required, effective collaboration tends to be expensive. Several respondents have seen their funders do more to encourage collaboration, though there is a feeling this is being achieved through an approach that is more stick than carrot. Competition for resources is seen as the biggest collaboration killer (as referenced in Box 4).

> *'Collaboration takes a lot of work – [there is] a tendency to underestimate the time needed. Funders [do not always] want to resource the level of staff time that goes into making these collaborations work.'*
>
> *"The abundance of organisations of all shapes and sizes is a strength in many respects, but a challenge when it comes to inclusive collaboration on shoestring resources.'*
>
> *'Cross-sector collaboration [on the] Policing Bill has been successful – organisations with very different focuses have come together to challenge something which could have far-reaching effects.'*

Diversity, equity and inclusion

The environmental movement is being challenged to address the structural inequalities that run through it, and to actively diversify the demographic profile of its staff, members and service users. The sector has been criticised for using exclusionary activism tactics, while the Black Lives Matter movement has posed searching questions about power, access and representation. According to one study, environmental professions are second only to farming as the least ethnically diverse occupations in England and Wales.[19]

We asked respondents to rate the strength of their own organisation on diversity, equity and inclusion (DEI), as well as the performance of the sector as a whole. Two thirds rate the sector's performance on diversity as 'poor' or 'very poor', with three in ten saying the same of equity and inclusion.

Many CSOs have stepped up their DEI-focused activity in the recent past. Measures reported in this survey include the development or revision of DEI strategies, policies and targets, appointment of board-level champions and creation of senior staff positions. This may explain why respondents consistently rate their own organisation's performance more highly than that of the sector overall; 65% say their organisation is performing 'ok' or better on diversity, and even greater majorities say the same of equity and inclusion.

19 https://policyexchange.org.uk/wp-content/uploads/2017/03/The-two-sides-of-diversity-2.pdf

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Even among respondents who say they have actioned appropriate policies and practices, there is a sense of slow progress. Some attribute this to the sector's historic lack of diversity as well as factors like pay and career progression. Research evidence appears to back this up. In one survey of students in further and higher education, 34% of respondents identifying as Black, Asian or other ethnic minority said the sector's lack of diversity discourages them from pursuing an environmental career.[20]

Respondents have a lot of ideas about what is needed to make progress. Within the sector, they want additional funding to connect with under-represented groups, pay for training, and support recruitment of a diverse staff base. Some want to see a greater emphasis on DEI in charitable monitoring and financial reporting.

Beyond the sector, respondents see a role for the education and training system in engaging more diverse audiences on environmental issues, and in strengthening career pathways into the sector. They also look to popular culture to create more role models and ambassadors.

> *'We're doing good internally in terms of policies, content, intersectional campaigning and learning, but generally still struggling to attract staff from minority backgrounds.'*
>
> *'We need to be thinking of innovative and long-term, sustainable ways of bringing people into the sector – from schools, to job creation, right through to providing the right support to enable the creation of future leaders that would really transform the sector. This longer-term investment needs to happen alongside rapid changes and actions now around the rest of our work.'*
>
> *'Targeted funding for work experience and paid internships would be a good way to give more people from underrepresented backgrounds the chance to work in the sector.'*
>
> *'[DEI is] often treated as an 'add-on' and is not integrated into everything an organisation does. Funding to achieve this would be valuable.'*

20 https://www.sustainabilityexchange.ac.uk/files/20181206_nus_race__inclusivity_and_environmental_sustainability_report.pdf

5 Successes and failures

We asked respondents to describe the UK environment movement's greatest successes and failures since our last survey in 2017.

Many of the successes that they name boil down to three interrelated developments: a step change in public awareness in relation to the climate emergency (and, to a lesser extent, the nature crisis); the political space this has opened up; and the tangible policies resulting from that, with regard to the UK's carbon strategy and post-Brexit legislation in particular.

As we saw in Section 4 above, respondents credit new social movements like XR and Fridays For Future for driving up levels of public concern. They believe that starker science and extreme weather events have also contributed to this shift, along with high-profile individuals like Sir David Attenborough and Greta Thunberg. All this set the stage for bolder policy action, and in general, respondents feel that environmental groups organised their advocacy quite effectively in response, especially when they acted collaboratively and were able to marshal allies from politics and business at vital moments.

The 2019 amendment to the Climate Change Act is seen as the sector's single biggest policy achievement, enshrining the UK's net zero by 2050 target into law. Many respondents also mention successful advocacy related to the Environment Bill. Other policies where respondents think the sector has done effective work include the Environmental Land Management Scheme (ELMS), the commitment to end new petrol and diesel car sales by 2030, the decision to stop the use of public money to finance fossil fuel infrastructure overseas, and a burst of climate emergency declarations by local councils.

Bolder plans for species reintroductions and the momentum behind rewilding are also cited among the movement's successes. Some respondents refer to increased practical action for wildlife conservation by the public, for example as a result of successful social media and citizen science campaigns that have encouraged gardeners to adopt wildlife-friendly habits or raised awareness of topics like water and air pollution.

However, where some see success, others see failure – or at least, missed opportunities and an inadequate response to the scale of threat. As energising as the surge in public awareness has been, some respondents point out there is still a relatively narrow demographic prepared to exercise their voice or vote for climate and nature action. This ties in with other reported failures, such as lack of diversity in the sector and its target audiences, along with a neglect of grassroots movement-building.

> ***'The majority now agree action on climate is needed. Now the movement must speak to the priorities that remain top of most people's lists – jobs, the economy and health – and become far more diverse. Without this there will not be a representative grassroots movement across the country and a just transition. Without this grassroots pressure it will be difficult to change the politics to deliver the policies.'***
>
> ***'Much of our nature is still in decline. We have not convinced enough people – policy makers, businesses, funders, the general public – of the importance of this. We struggle to influence those outside the group who have at least a very basic interest in the subject.'***

Without more pressure from a wider and better organised base, some respondents think governments and business will continue to speak warm words but evade decisive action. Several CSOs see post-Brexit policies as under-ambitious and inadequate; one says the Environment Bill 'consistently just fails to meet the mark'.

Several respondents give examples of where policy implementation falls short, with regard to both government regulation and self-regulation by industry (for instance, Marine Protected Zones that are 'protected in name only' and a 'lack of rigour' in carbon offsetting standards). Respondents express regret over the sector's difficulty in holding decision-makers to account. Some blame an 'insufficient focus' on policy implementation by CSOs (and funders) especially in the context of short-term project funding cycles. Others point out that some policy areas are simply very difficult to monitor and police – for instance a lack of scrutiny mechanisms for trade deals.

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Box 5: Most effective environmental groups and messages to peers

Respondents were asked to name up to five UK environmental groups (excluding their own) which accomplish the most with the resources at their disposal. Organisations that received three or more mentions are listed in Chart 11 (see Appendix 3 for the list of all organisations mentioned at least once). The RSPB tops this year's league table, one mention ahead of ClientEarth, which placed first in our 2017 survey.

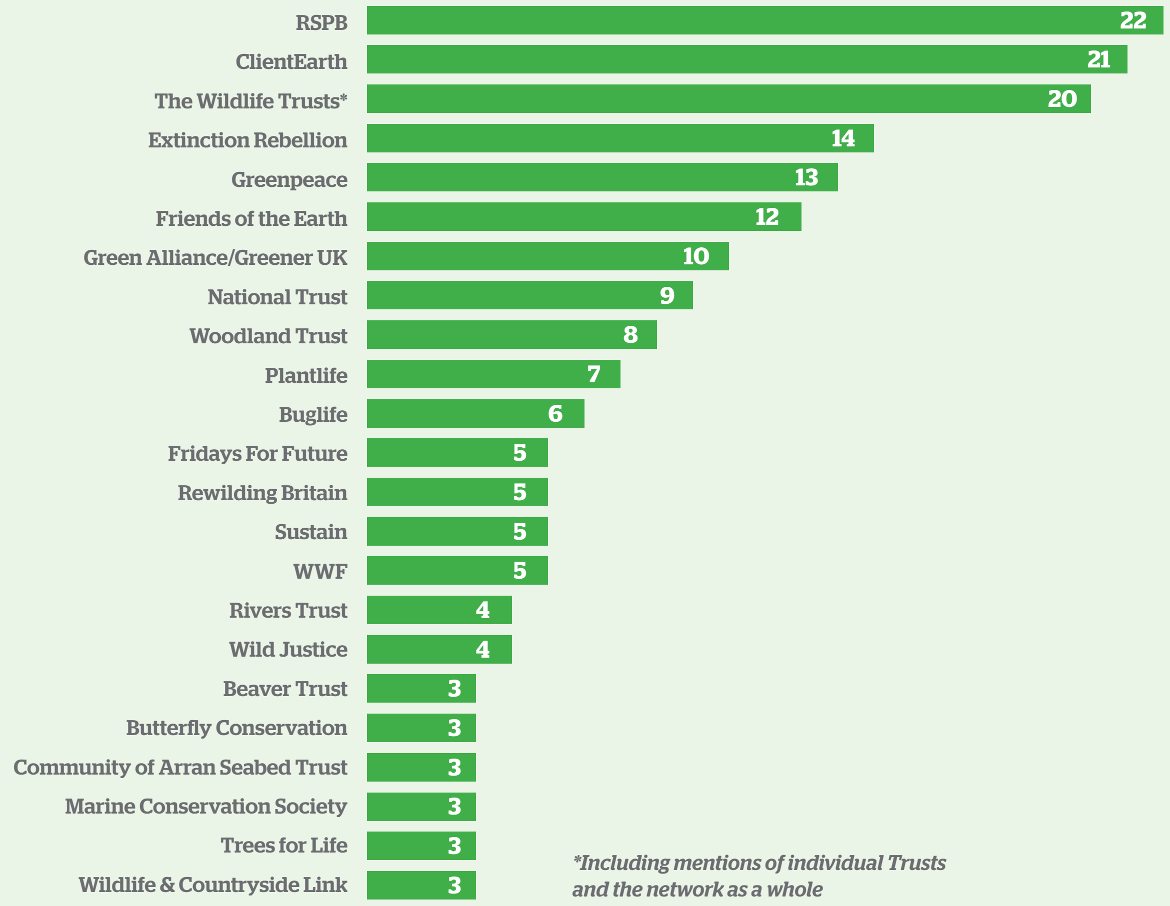

Chart 11: Most effective UK environmental groups according to respondents (labels indicate number of mentions).

We also asked respondents what they would like the sector's leaders (i.e. their peers) to do differently. Most of their comments converge on one central theme: move beyond competition, towards more strategic collaboration. As one says, 'leave your brand at the door'. If CSOs were prepared to 'share plans with others earlier' or to 'come together to work on our theories of change', this would pave the way for more strategic planning, which might help the sector to 'solve problems together' or even improve its 'strategy for systems change'. It might also allow them to embrace the differentiation of roles that several respondents want to see come about, so that individual groups can 'identify their USP in any given partnership' and 'avoid trying to be all things to all people'.

Another cluster of respondents advise their peers to prioritise 'justice, equity, diversity and inclusion' and to 'employ people who aren't like you'. Doing so would bring many benefits, including strengthening the sector's voice and credibility. In turn, this might help organisations to act on the final big piece of advice given by respondents from organisations large and small: for environmental groups to 'be bolder' both in their ambitions for change, and their willingness to call out decision makers who are not ambitious enough. Some express this in calls for environmental groups to 'be more radical', 'think bigger' and 'be less polite (to politicians, not to each other)'. One says, 'think and act as if we are in an emergency – we are!'.

6 Messages to funders: how to support a more effective sector

What do UK environmental groups want to see philanthropic funders do differently or better, to support and enable the sector to work as effectively as it can? We have distilled the key themes from respondents' answers to this question below. These should not be read as a consensus view from all 116 CSOs, but each was repeated often enough to represent a valid point of discussion and challenge to the funder community.

1 Think big and push funding towards root causes

Respondents want funders to look at the big picture, and focus more on the root causes of climate change, biodiversity loss and social injustice, as well as on visible manifestations of environmental harm. This may mean more work on systemic drivers such as finance, power and inequality. **What does systems change look like and what will it take for more environmental grantmakers to fund it? Is this something all funders should do, or would a division of labour within the philanthropic community be more productive?**

> *'More funding is needed [at] the root causes of the climate and ecological crisis. This means work dealing with tackling the 'individual society', consumerism, connection to each other and the natural world.'*
>
> *'Look at the big picture: what is the overall, collective strategy that brings about the biggest change and how do funding awards make that happen? This may contradict funders' own preferences but some short-term variation [from their own strategies] to move the political/social dials will help them meet their own aims in the longer term.'*
>
> *'It is easier to fund the more visible and easily attributable work. A lot of what needs to happen now is going to require considerable engagement [with] communities to help them participate in the transition and benefit from it. That will mean less visible wins and impact that is harder to measure.'*

2 Support innovation, but don't abandon the tried-and-tested

Some CSOs take issue with grantmakers who chase innovation for the sake of it, overlooking or even disrupting good long-term work as they do so. Others urge funders to embrace more innovation and back new ideas. These positions highlight a tension between two important roles of philanthropic funding - to provide seed capital to get new initiatives off the ground, and at the same time offer patient capital that enables long-term investment and planning, which are particularly important for social change. **What is the right balance to be struck here – or, if there is no single answer, what factors should funders consider when weighing up the balance of their individual grants portfolios?**

> *'Don't just fund innovation. Replication of good ideas that work needs funding too.'*
>
> *'Realise that it's not just about large, established, "safe" charities. [Funders] need to seriously consider new organisations with novel approaches, a strong vision, actionable, practical goals and momentum amongst the public.'*
>
> *'[We often] need to reinvent long-term projects to make them appealing to funders – the "new and shiny". It is right that we constantly review impact, but it is not effective to re-invent a project that is already working well and just needs to continue to have an impact.'*

3 Less is more – or the other way around?

Related to the point above, there is disagreement over the extent to which the funding community should let a thousand flowers bloom by backing a wide range of grant partners versus investing in a smaller number of keystone groups more heavily. The former approach can encourage fragmentation of the field, with a lack of strategic alignment even among organisations doing very similar work. Some respondents think the proliferation of organisations is a good thing, and see this almost as a condition of movement-building – however in the reality of today's grants market it can often mean money spread wide and thin. The latter approach encourages consolidation, potentially resulting in larger, longer-lasting grants that could help overcome the 'non-profit starvation cycle' referred to in Box 4. **Would these tensions go away if there were simply more money to go around, or is there a bigger debate to be had about the number and structure of groups in the sector today, and how this relates to the sector's effectiveness?**

> *'Engage with increased numbers of NGOs rather than keeping to the familiar few.'*
>
> *'[We need] more "grass roots" funding. Each community and each area needs a bespoke approach to reverse environmental decline. There is not a one-size fits all approach.'*
>
> *'Too many small organisations without the economies of scale to respond to the urgency and scale of the issues – all trying to run organisations and address the biggest issue of our time. It's madness! Significant reshaping of the sector is needed.'*

4 Understand the funding ecosystem and your role within it

Just as respondents see a need for CSOs to work more closely together, so they want funders to collaborate better as well, and to develop a deeper, shared understanding of the field into which they are making grants. In this way their grants are more likely to be complementary rather than duplicative, filling in gaps in capacity. **What tools would be most useful to funders when it comes to promoting this kind of collaboration? Which other sectors could philanthropic funders learn from so as to increase their collective impact?**

> *'Collaborate more where the vision and ambition of particular funds are shared.'*
>
> *'Set clear funding priorities and communicate effectively with other funders to avoid duplication.'*
>
> *'Fund outside the UK, in locations where philanthropic capital is much scarcer.'*

5 Proactively support collaboration

Some respondents would like funders to more actively help to broker or convene civil society collaborations, as well as to resource them financially. Although not a huge number of CSOs express this opinion, those that do include several larger groups that have participated in campaign and advocacy collaborations themselves. This sentiment is perhaps best read as a desire for funders to create and support a 'neutral' space that allows collaboration to flourish, and not as an invitation for funders to impose their own strategies or agendas on grant partners. **What role could funders play in fostering collaboration in the sector while not exerting undue or unhelpful influence over their grantees' strategies?**

> *'Provide more collaborative funding and support the joining up and aligning of the sector. What's the work programme for the whole sector? Who's leading on what bits and how does it all align?'*
>
> *'Fund and actively engage with coordination. It is very hard for organisations that essentially compete for funding/attention to genuinely collaborate unless someone outside that group is chairing them to specific outcomes... it needs external funding to make the space for real coordination and have someone with the independent expertise to make it happen.'*
>
> *'Be more active in facilitating / suggesting partnerships where you see opportunities to add value.'*

6 Grow the pie

A popular comment thread relates to growing the overall level of funding for environmental work. Respondents want funders to support this by increasing their own spend and recruiting others to start or scale up their giving. They also want funders to explore other means of getting money to the sector besides grants. **The amount of UK foundation funding directed to environmental causes doubled in the three-year period to 2018/19, but was still just 6% of total UK foundation giving;[21] how can funders work together with CSOs and network organisations like EFN to help accelerate this growth?**

> *'Act with urgency, give bigger grants and release funds that are tied up. What good is the cash in 10-20 years when climate change has run away by then?'*
>
> *'Collectively, environmental funders could be a powerful voice persuading non-environmental funders to start including environmental issues within their priorities, particularly where there is demonstrable overlap [with] social outcomes.'*
>
> *'Offer their capital resources as patient lending – low-interest, long-term loans which undercut commercial rates and terms. Use their business connections to unlock patient lending. Philanthropists can make this specific ask to their contacts with a cause and a charity in mind.'*

21 https://www.greenfunders.org/where-the-green-grants-went-8/

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7 Be a good partner

One of the most valued characteristics of philanthropic funding is the flexibility it allows recipients to pursue their goals in relative freedom (see Box 6). Some respondents clearly enjoy a close partnership with their funders, and value the advice, insight and contacts that this can bring. Others are more circumspect. Funder frameworks for measuring impact are a particular point of tension, as are overly prescriptive application and reporting formats more generally. **What is the right balance for funders to strike in terms of increasing the quality of their relationships with grantees, to help them raise and spend funds as efficiently and effectively as possible?**

> *'Communicate funding strategies/ theory of change clearly so we can assess the best matches. Where possible, give clarity on how applications are assessed. Invest time and thought in sharing feedback on unsuccessful applications so we can adapt and improve.'*
>
> *'In terms of nature, 'measurable outcomes' can sometimes be difficult to demonstrate in short-term funding cycles. Changing the way in which we are expected to measure and demonstrate impact could be helpful, allowing us to plan for longer-term landscape-scale projects which actually "fix nature".'*
>
> *'Understand that no change (or even some negative change) can be a huge win! We are often fighting to preserve past gains or to stop new wrongs and that often doesn't fit with the type of aims and objectives funders expect to see.'*

Box 6: The particular value of philanthropic funding

As we have seen, trust and foundation grants are the most widely received type of income in this survey.

We asked respondents to tell us what, if anything, sets philanthropic funding apart from other income sources. CSOs of all sizes say this type of funding can add discernible value, especially in relation to supporting them to innovate, experiment and otherwise take risks. Some respondents – mainly from smaller CSOs – say they depend on philanthropic income not only to innovate but to assure their organisation's day-to-day survival.

> *Philanthropic funding…*
>
> *'…directly funds our hardest-hitting work and enables us to take risks to pilot and scale-up services that are unproven to contracting bodies.'*
>
> *'…allows us to start conversations and plan ideas that might not be implemented for a few years, but without that "seed funding" would never happen at all.'*
>
> *'…[is] incomparable – without it we would not be able to exist.'*

Respondents also mention the flexibility of philanthropic funding. This allows recipients the freedom to pursue their own agendas, and in some cases to respond swiftly to external events, and is strongly associated with unrestricted core funding support.

> *Philanthropic funding…*
>
> *'…allows us to work independently and stay true to our core mission.'*
>
> *'…is a great enabler in some of the most boundary pushing work we have done because it is not weighed down by excessive bureaucracy.'*
>
> *'…provides the ability to do risky actions and campaigns quickly.'*

Some respondents also value the relationships they develop with foundation donors, with one describing philanthropy as 'more of a partnership than other sources of income'. Others reference the sense of solidarity and confidence from funders who 'stand behind us' with 'belief in what we're doing'. These relationships may involve the funder partner leveraging their wider circle of influence in support of the work being done.

For all the qualities that philanthropic income can represent, we note that not all philanthropic funding embodies these – for instance, many respondents still find unrestricted grants hard to attain (as we saw in Box 1).

7 Conclusions

This survey has explored what the UK environmental movement looks like today from the perspective of different CSOs, ranging from large multi-issue organisations to much smaller groups with a narrow thematic focus. Our respondents vary in their priorities, tactics and even their understandings of what comprises 'effectiveness' and 'success'. Some enjoy substantial public support in the form of donations, membership and volunteering; others have lower visibility and/or perform specialist roles within the wider movement, and are therefore more reliant on philanthropic funding.

As varied as they are, our respondents often identify similar opportunities and challenges, in terms of increasing their own organisational impact and responding to the external context shared with their peers. These translate into clear and broadly consistent messages about what the environmental sector needs to work more effectively as a whole.

We saw calls for more investment in **political advocacy** and **movement-building**, and in various types of **communications work**, including public campaigning and engaging new audiences.

Respondents see a need for the sector to strengthen its skills and capacity in several key areas, including **network and community organising**, and **diversity, equity and inclusion**. More expertise in economics, policy and engaging with the corporate sector is also seen as necessary and desirable; however, respondents say the sector's **generally low salaries** are a barrier to recruiting appropriately skilled staff, including those from ethnically diverse backgrounds.

We heard how skills in these priority areas have underpinned some of the sector's recent successes, in particular **heightened public awareness** towards the climate and nature emergency and the slew of **new environmental legislation** towards net zero targets and post-Brexit regulation.

However, we also heard **frustration that awareness is not being turned into action** and engagement by a wider set of audiences, and **concern that the sector's headline policy wins will be whittled away** by weak targets and enforcement when they hit the ground. This relates to the powerful vested interests that the sector still has to face down, many of whom are casting themselves as nature and net zero heroes even if their positions more truly align with what researchers describe as **'discourses of delay'.**[22]

A preoccupation with **de-regulation** among some parts of the political establishment compounds this challenge, as does the **closing of civic space**. Although the latter received relatively few mentions here (other than specific concerns relating to the Police, Crime, Sentencing and Courts Bill), another recent survey of campaigners across different sectors revealed strong concern about how new legislation will 'chill' campaigning activity, with many detecting a hardening attitude among politicians and the media.[23] All this represents a worrying development for many of our respondents – who see **public campaigning** as one of the environmental sector's key strategies for change, and who want it to be bolder in calling out damaging policies and speaking truth to power.

The need for environmental groups to **collaborate more and better** – so prominent in the 2017 and 2013 editions of this survey – has not gone away. Several examples of strong collaboration are given and there is a sense of active learning among CSOs (and funders) about what it takes to build effective collaborative relationships, and to diffuse the factors that can destabilise these.

Adequate resources are seen as vital if collaboration is to become more effective. We attempt to distil some key takeaways regarding how funders can better support collaboration in Section 6. This touches on more nuanced or contested topics such as **questions**

22 https://www.carbonbrief.org/guest-post-how-discourses-of-delay-are-used-to-slow-climate-action

23 https://smk.org.uk/wp-content/uploads/2022/02/SMK-Campaigner-Survey-2021-full-results.pdf

around the need for structural consolidation in the sector, along with what makes for **healthy, trustful and accountable partnerships** between foundations and grantees.

Some messages to funders are more straightforward. We heard about the value of **core and unrestricted funds**, although most CSOs say these are not becoming easier to acquire. Respondents are still struggling to raise enough funds full stop, while the predominance of **short-term project grants** is insufficient to assure long-term financial health. We also saw how **most trust and foundation funding goes to larger organisations**, as reflected in our previous research,[24] even though smaller CSOs are more reliant on this income source.

In terms of future priorities for the sector, it is worth acknowledging that our survey pre-dates the crisis in Ukraine, which is already reshaping the context for environmental action; not least with regard to the clean energy transition and global food supplies. Despite the ever-changing backdrop of world events, it seems fair to predict that the main sector needs that shine through in this survey – more collaborative action, stronger movement-building and better communications – will continue to be relevant for a good while to come.

This survey has highlighted the main pathways to increasing the impact and effectiveness of environmental work, as seen by leaders of the sector. It has also shown that funder habits, preferences and practices have a strong bearing on how far and fast these journeys can be made. We look forward to continuing the conversation about how the philanthropic community and civil society can work together in taking these important steps. Do let us know your suggestions, and any other feedback on this report, at info@greenfunders.org.

24 https://www.greenfunders.org/where-the-green-grants-went-8/

Appendix 1 Survey questions

Instructions/rubric for respondents and questions relating to EFN's use of the survey data have been omitted in order to save space.
** Indicates required questions.*

About you

1* Please tell us who you are *(Name, Role, Email address, Organisation, Website).*

Organisational Income and Operations: Summary of your last financial year

3* What was your organisation's total income and expenditure (in £ GBP), for your last full financial year?

4* What was the start date of that financial year, to the nearest month?

5* What were your organisation's sources of funding in the last financial year? Please estimate what percentage of your income came from each source below. Note that the 'grant' categories also include donation income from these sources.

- *Trust, foundation, or charity grants*
- *Central government grants*
- *EU government grants*
- *Local authority grants*
- *Lottery grants*
- *Business grants (excluding sponsorship)*
- *Individual donors (including crowdfunding & event income)*
- *Other grants*
- *Membership fees*
- *Legacies*
- *Sales to the public*
- *Business contracts (including sponsorship)*
- *Public sector contracts*
- *Charity, trust or foundation contracts*
- *Investment income*
- *Other sources (please specify in box below)*

6 Other/ any comments?

7 How many individuals have donated money to your organisation in the last financial year (a rough estimate will do)?

8* How many paid full-time equivalent staff, including operations staff, work on environmental issues for your organisation?

9 How many unpaid volunteers work on environmental issues for your organisation?

10* How would you describe your organisation's overall state of financial health? *(Very good / Good / Moderate / Poor / Very poor)*

Organisational Income and Operations: Impacts of Brexit and Covid-19

11 How, if at all, have your organisation's overall levels of income and/or expenditure changed in the last 2 years, due to any factors (not just Covid or Brexit)? *(For both income and expenditure: Significant decrease – more than 40% / Moderate decrease – 10% to 40% / Small decrease – less than 10% / No change / Small increase – less than 10% / Moderate increase – 10% to 40% / Significant increase – more than 40% / Too hard to say)*

12 To what extent has Brexit influenced any changes in your income and/or expenditure? Consider, for instance any additional effort you may have made on policy advocacy, or to maintain a working presence in the EU as well as the UK. *(For both income and expenditure: A great deal / A little / Not at all / Too hard to say)*

Please explain your answer.

13 To what extent has the Covid-19 pandemic influenced any changes in your income and/or expenditure? Consider for instance, changes in your workforce, member or volunteer base, demand on your services, and Covid-proofing your operations. *(For both income and expenditure: A great deal / A little / Not at all / Too hard to say)*

Please explain your answer.

Organisational Priorities: Geographies

14* How did your organisation's total expenditure break down between different geographical scales in your last financial year? Please estimate what percentage of your expenditure goes towards each scale. If there is a big separation between your programme and operations spend, e.g. you are headquartered in the UK but carry out most of your work overseas, please mention this in the comment box.

- *Local UK (within a particular community or communities)*
- *Regional UK - home nations (England, Northern Ireland, Scotland or Wales)*
- *Regional UK - other (e.g. county or multi-county scale)*
- *National UK*
- *UK Overseas Territories*
- *European Union - institutions (i.e. Commission, Parliament, Council level)*
- *European Union - member states*
- *International (in one or more countries outside the UK and EU)*
- *Global institutions (e.g. United Nations, OECD, World Trade Organisation)*
- *Other (please specify in box below)*

15 Other/ any comments?

16 If your organisation works in the UK home nations, please tell us which ones and what geographic scale is the focus on that work. *(For each of England, Northern Ireland, Scotland and Wales: Local (e.g. community or city) / Regional (e.g. county or multi-county) / National)*

Any comments?

Organisational Priorities: Issues

17* How did your organisation's expenditure break down among different issues in your last financial year? Please estimate what percentage of your spend was invested in each thematic issue below (see Appendix 4 for a description of each thematic issue).

- *Agriculture and food*
- *Biodiversity and species conservation*
- *Climate and atmosphere*
- *Coastal and marine ecosystems*
- *Consumption and waste*
- *Energy*
- *Fresh water*
- *Population*
- *Sustainable communities*
- *Terrestrial ecosystems and land use*
- *Toxics and pollution*
- *Trade and finance*
- *Transport*
- *Multi-issue (for programme expenses that are not specific to a particular issue)*
- *Other (please specify in box below)*

18 Other/ any comments?

19 Are there any thematic issues you find it particularly difficult to fundraise for? These may be issues you work on now, or issues you would like to work on but cannot due to difficulty raising funds. Please select as many as apply. *(Select from same list of thematic issues as in Q18)*

20 Other/ any comments?

Organisational Priorities: Strategies

21* How does your organisation's work effort break down between different strategies for change? Please enter what percentage of your work effort goes towards each strategy below.

- *Political advocacy (e.g. engaging with governments and politicians)*
- *Litigation (e.g. legal action aimed at changing government policy or harmful corporate practices)*
- *Direct action (e.g. demonstrations, boycotts, brand attacks etc)*
- *Movement-building (e.g. grassroots mobilisation, constituency building, civil society co-ordination)*
- *Funding (e.g. awarding grants to other organisations)*
- *Public campaigning (e.g. to engage individuals as consumers, citizens and voters)*
- *Societal debate (e.g. public outreach to shift values and norms, re-think concepts like economic growth)*
- *Species conservation (e.g. conservation science, breeding programmes, species re-introduction)*
- *Ecosystem protection and restoration (e.g. through direct management or partnering with other land, sea or river managers)*
- *Environmental education (e.g. provision of courses, development of curriculum materials, hosting school trips)*
- *Service provision (e.g. farmers' markets, community renewables, maintaining access to nature including amenity green spaces)*
- *Research and evidence-sharing (e.g. scientific research, expert advice)*
- *Business influencing (e.g. providing advice, running certification or monitoring schemes, entering partnerships with companies or banks)*
- *Other activities (please specify in box below)*

22 Other/ any comments?

23 Are there any strategies you find it particularly difficult to fundraise for? These may be strategies you use now, or ones you would like to develop but cannot due to difficulty raising funds. Please select as many as apply. *(Select from same list of strategies as in Q21)*

Other/ any comments?

Organisational Priorities: Skills and Expertise

24 Which of the following skill sets and areas of expertise do you see as priorities for your organisation to acquire or strengthen over the next few years? Please rank as many as you like in order of importance.

- *Behavioural science, strategic communications and framing*
- *Alliance building/ network organising*
- *Community engagement and organising*
- *Corporate decision-making and culture*
- *Diversity, equity and inclusion*
- *Economics and financial systems expertise*
- *Environmental science*
- *Fundraising*
- *Human resource management*
- *Leadership and organisational planning*
- *Legal expertise*
- *Policy expertise*
- *Political lobbying*
- *Project and financial management*
- *Social enterprise and/or entrepreneurship*
- *Marketing and public relations, including social media*
- *Net zero planning for organisational operations*
- *Campaign strategy*

25 Other/ any comments?

Sector-Wide View: Strategies

26 Which of the following strategies for change do you think UK environmental groups (not necessarily yours) should do more of, i.e. which have the most potential to increase the effectiveness of the sector as a whole? Please rank as many as you like in order of importance. *(Select from same list of strategies as in Q21)*

27 Other activities/ any comments?

Sector-Wide View: Skills and Expertise

28 Which of the following skill sets and areas of expertise do you think UK environmental groups (not necessarily yours) most need to invest in over the next few years? Please rank as many as you like in order of importance. *(Select from same list of skills as in Q24)*

29 Other/ any comments?

30 Are any of these skill sets particularly hard for the sector to acquire, and why?

Sector-Wide View: Successes and failures

31 What do you consider to be the UK environment sector's greatest success since 2017 (the date of our last survey), and what do you think contributed to that success?

32 What do you consider to be the UK environment sector's greatest failure since 2017, and what do you think contributed to that failure?

The Sector in Focus: Communications

The last few years have seen the sector (and its funders) make efforts to improve the communication of environmental issues, for instance by identifying frames and narratives to engage new audiences.

33 How do you rate the sector's progress in this area since 2017? Are environmental groups communicating their asks and issues more effectively now than they were then? *(Huge improvement / Moderate improvement / No improvement / It's got worse / Not sure)*

34 Leading on from above, how would you rate the overall quality of the sector's communications now? *(Excellent / Very good / Moderate / Poor / Very poor / Not sure)*

Any comments?

35 Are there specific initiatives that have helped your organisation to acquire or deepen its communication skills?

36 If your organisation has recent communication successes of which you are particularly proud - especially in relation to engaging new audiences on environmental issues - please tell us about them here.

The Sector in Focus: Collaboration

The last few years have seen the sector (and its funders) make efforts to improve collaboration between organisations working on environmental issues.

37 How do you rate the sector's progress in this area since 2017? Are environmental groups collaborating more effectively now than they were then? *(Huge improvement / Moderate improvement / No improvement / It's got worse / Not sure)*

Any comments?

38 How would you rate the sector's overall performance on collaboration now? *(Excellent / Very good / Moderate / Poor / Very poor / Not sure)*

Any comments?

39 Are there specific initiatives that have helped your organisation to work more collaboratively?

40 If your organisation has been part of any recent collaborations that have worked particularly well, please tell us about them here. What makes these collaborations successful? (These could be collaborations within the environment sector, or with organisations from other sectors.)

41 How frequently do you collaborate with groups from other sectors? For instance, trade unions, development, health or education groups, or those working on other social issues? *(All the time / Often / Sometimes / Rarely / Never)*

42 Which sectors do you have collaborators in? Please select as many as apply.

- *Education*
- *Health*
- *Human rights*
- *International development*
- *Unions*
- *Other (please specify)*

The Sector in Focus: Diversity, Equity and Inclusion

Like other sectors, the environmental movement is being challenged to address the inequalities that still run through it – in terms of power, access and representation, as these apply to staff, visitors or to how groups engage with society as a whole.

For the purposes of this section we use the following definitions (Source: Ford Foundation):*

***Diversity** is the representation of all our varied identities and differences (race, ethnicity, gender, disability, sexual orientation, gender identity, national origin, tribe, caste, socio-economic status, thinking and communication styles, etc.), collectively and as individuals.*

***Equity** seeks to ensure fair treatment, equality of opportunity, and fairness in access to information and resources for all.*

***Inclusion** builds a culture of belonging by actively inviting the contribution and participation of all people.*

43 How would you characterise your organisation's current performance on diversity, equity and inclusion? All responses will be anonymised, so please answer freely. *(For each of Diversity, Equity and Inclusion: Excellent / Good / OK / Poor / Very poor / Don't know)*

44 How would you characterise the environmental sector's current performance on diversity, equity and inclusion? *(For each of Diversity, Equity and Inclusion: Excellent / Good / OK / Poor / Very poor / Don't know)*

Any comments or examples?

45 What do you feel is needed, to help the sector to make more substantive progress on these issues?

Peers, Partners and Funders

46 Which non-profit UK environmental groups (not including your own) do you think accomplish the most, given the resources at their disposal – or have potential to accomplish the most in the case of new organisations? Please name up to five in order of effectiveness.

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

48 Civil society groups often make the case for funders to provide more unrestricted or core funding. In your experience, is this type of funding becoming easier or harder to come by? *(Much easier / Easier / No change / Harder / Much harder)*

Any comments?

49 What do you think philanthropic funders need to do differently in the coming months and years, to rise to the environmental challenges we're facing? (Other than provide more unrestricted, core and long-term funding.)

50 "Relative to other sources of income, the particular value of philanthropic funding to my organisation is..." Please complete the sentence.

Bonus Section: Changing context for environmental work

Topic #1: 'New power'

The last few years have seen a surge in social movement activity, including Black Lives Matter, Extinction Rebellion and the student climate strikes. Such movements often disrupt the status quo, raise awareness and shift the centre ground of public opinion, but in doing so they can polarise issues.

53 What do you think environmentally-focused social movements have achieved, and how can the sector as a whole consolidate and build on these achievements?

54 To what extent has your organisation changed its strategy or activities in response to the evolution of new social movements?

Topic #2: General shifts and trends

There are many other political, social and economic changes that will have a bearing on the effectiveness of the environmental sector's work. For instance, the fomenting of 'culture wars', restrictions on protest and other manifestations of closing civic space, the fragmentation of public debate, or the UK's shifting electoral map. You may have other issues in mind too, including of course the aftermath of coronavirus and Brexit.

55 What do you personally see as the biggest challenges and opportunities in these terms?

Appendix 2 Organisations responding to the survey

Action for Conservation
Action for the River Kennet
Association for the Protection of Rural Scotland
Atlantic Salmon Trust
Aviation Environment Federation
Badger Trust
Bat Conservation Trust
Beaver Trust
Berkshire, Buckinghamshire and Oxfordshire Wildlife Trust
Biofuelwatch
Bioregional
Black Environment Network
Blue Marine Foundation
Botanical Society of Britain and Ireland
Bright Blue
Buglife
Bumblebee Conservation Trust
Butterfly Conservation
Carbon Tracker Initiative Limited
Centre for Sustainable Energy
CHEM Trust
City to Sea
CleanupUK
ClientEarth
Community of Arran Seabed Trust
Compassion in World Farming International
Conservative Environment Network
CPRE, The Countryside Charity
Earthwatch Europe
Ecological Land Cooperative
Elephant Family
Environmental Investigation Agency
Environmental Rights Centre for Scotland
Faith for the Climate
Fauna and Flora International
Food Ethics Council
Food, Farming and Countryside Commission
Forest Town Nature Conservation Group
Freshwater Habitats Trust
Friends of the Earth
Froglife Trust
Gaia Foundation
Galapagos Conservation Trust
GM Freeze
Green Alliance
Green Schools Project
Green Team
Greenpeace UK
Groundwork UK
Hampshire and Isle of Wight Wildlife Trust
Heal Rewilding
Heart of England Forest
Herts and Middlesex Wildlife Trust
Hubbub UK
InfluenceMap
Keep Wales Tidy
Lancashire Wildlife Trust
Larger Us
Life Cycle UK
London Wildlife Trust
Marine Conservation Society
Mums for Lungs
National Trust for Scotland
Nature Friendly Farming Network
Northumberland Wildlife Trust
Nourish Scotland
Orchard Project
Organic Research Centre
Parks Foundation (Bournemouth)
Permaculture Association (Britain)
Pesticide Action Network UK
Planning Democracy
Platform
Population Matters
Power for People
Publish What You Pay UK
Purpose Disruptors
Rainforest Concern
Real Farming Trust
Rewilding Britain
Rivers Trust
Royal Horticultural Society
Royal Society of Wildlife Trusts*
RSPB
Save the Rhino International
SCOTLAND: The Big Picture
Scottish Badgers
Scottish Environment LINK
Scottish Seabird Centre
Scottish Wildlife Trust
Sea-Changers
ShareAction

Sheffield and Rotherham Wildlife Trust
Soil Association
Somerset Wildlife Trust
Students Organising for Sustainability UK
Sustainable Soils Alliance
Trade Justice Movement
Trees for Life
Trent Rivers Trust
Ulster Wildlife Trust
Unchecked UK
UNEP-WCMC
United Kingdom Without Incineration Network
Uplift
Veganuary
Warwickshire Wildlife Trust
Wildfowl and Wetlands Trust
Wildlife and Countryside Link
Wildlife Trust for Bedfordshire, Cambridgeshire and Northamptonshire
Wildlife Trust of South and West Wales
WildTeam
Woodland Trust
WWF UK
Yorkshire Wildlife Trust

This list excludes one respondent organisation that wished to remain anonymous.

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

Appendix 3 Environmental organisations accomplishing the most, relative to the resources at their disposal

The table below shows all the CSOs that were named in response to the question 'Which non-profit UK environmental groups (not including your own) do you think accomplish the most, given the resources at their disposal – or have potential to accomplish the most in the case of new organisations?' (Respondents were asked to name up to five in order of effectiveness; this table indicates the number of mentions regardless of how they were ranked.)

Organisation	Number of mentions
RSPB	22
ClientEarth	21
The Wildlife Trusts	20
Extinction Rebellion	14
Greenpeace	13
Friends of the Earth	12
Green Alliance/Greener UK	10
National Trust	9
Woodland Trust	8
Plantlife	7
Buglife	6
Fridays For Future	5
Rewilding Britain	5
Sustain	5
WWF	5
Rivers Trust	4
Wild Justice	4
Beaver Trust	3
Butterfly Conservation	3
Community of Arran Seabed Trust	3
Marine Conservation Society	3
Trees For Life	3
Wildlife & Countryside Link	3
Action for Conservation	2
Aldersgate Group	2
Ashden	2
Bat Conservation Trust	2
Bumblebee Conservation Trust	2
E3G	2
Environmental Investigation Agency	2
Environmental Rights Centre for Scotland	2
Fauna and Flora International	2
Fidra	2
Platform	2
Soil Association	2
The Conservation Volunteers	2
Wildfowl and Wetlands Trust	2
Amphibian and Reptile Conservation	1
Badenoch and Strathspey Conservation Group	1
Black & Green Ambassadors	1
Blue Foundation	1
Blue Ventures	1
Born Free Foundation	1
Breast Cancer UK	1
British Trust for Ornithology	1
Canal & Rivers Trust	1
Carbon Tracker	1
Centre for Ecology and Hydrology	1
ChemTrust	1
Choose Love	1
City of Trees	1
Cleeve Prior Heritage Trust	1
Climate Coalition	1
Coastal Communities Network	1
Conservative Environment Network	1
CPRE, The Countryside Charity	1
Crack the Crisis	1
Culture Unstained	1
Cycle Sisters	1
Ecological Land Cooperative	1
Environmental Justice Foundation	1
Ethical Consumer	1
Fareshare	1
Feedback	1
Fields in Trust	1
Fish Legal	1
Food Ethics Coucil	1
Food Foundation	1
Food, Farming and Countryside Commission	1
Forest School Association	1
Forestry Commission	1
Fossil Free UK	1
Game & Wildlife Conservation Trust	1
Global Action Plan	1
Global Social Leaders (Future Foundations)	1
Global Witness	1
Green Building Council	1
Green Finance Institute	1

Organisation	Number of mentions
Heal Rewilding	1
Hope for the Future	1
Hubbub	1
Influence Map	1
Islington Clean Air Parents	1
Royal Botanic Gardens, Kew	1
Landworkers Alliance	1
LEAF (Linking Environment and Farming)	1
Learning Through Landscapes	1
Make Space for Girls	1
Missing Salmon Alliance	1
Mums for Lungs	1
National Trust for Scotland	1
Nature Conservancy	1
Nature Friendly Farming Network	1
New Economy Organisers Network	1
Oil Change International	1
Oxfam	1
Peers for Planet	1
People and Planet	1
People's Trust for Endangered Species	1
Plastic Free North Devon	1
Population Matters	1
Possible	1
Revive (Scotland)	1
River Action	1
Scotland: The Big Picture	1
Scottish Badgers	1
Scottish Environment LINK	1
Sea Shepherd	1
Seawilding	1
ShareAction	1
Stop Climate Chaos Scotland	1
Stop HS2	1
Students Organising for Sustainability UK	1
Surfers Against Sewage	1
Sustainable Food Trust	1
Trade Justice Movement	1
Transport Action Network	1
Tree Council	1
UK Grain Lab	1
UK Student Climate Network	1
UK Without Incineration Network	1
Uplift	1
WatersideCare	1
Yes to Life No to Mining	1
Zero Carbon Campaign	1
Zero Hour	1

Appendix 4 Thematic issue categories

Agriculture and food – a very broad category, including: 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.

Biodiversity and species preservation – another 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.

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.

Coastal and marine ecosystems – includes support for work on fisheries; aquaculture; coastal lands and estuaries; marine protected areas; and marine pollution (such as marine dumping).

Consumption and waste – 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.

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

Fresh water – 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.

Sustainable communities – covers urban green spaces and parks; community gardens; built environment projects; and community-based sustainability work.

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.

Population – Work that focuses specifically on reducing the rate of human population growth, as a means of fulfilling environmental and social goals. Often coupled to work that promotes women's reproductive and broader rights, including equitable access to family planning and to education for girls.

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.

Toxics and pollution – 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.

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.

Transport – includes all aspects of transportation, including public transport systems; transport planning; policy on aviation; freight; roadbuilding; 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.

About the Environmental Funders Network (EFN)

EFN's 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. Funders interested in joining EFN or finding out more about the network should contact us using the contact form at https://www.greenfunders.org/funders/.

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

EFN is a charity registered in England and Wales (no. 1181318) and Scotland (no. SC050579). Our registered address is 48 High Street, Long Crendon, Aylesbury, Bucks HP18 9AF.

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