



The Environmental Fundraiser's Handbook

Creating meaningful relationships

[00:00:00] **Natasha:** Welcome to The Environmental Fundraiser's Handbook, a video mini-series from the Environmental Funders Network and the Green Fundraisers Forum. This is [00:00:15] a series about why environmentalism isn't broken. It's broke. I'm Natasha Ratter and I run the Green Fundraisers Forum. This series is really about having honest, peer led conversations about what actually works in environmental fundraising [00:00:30] and how to do it without burning out.

[00:00:32] **Natasha:** We're recording here in the Onion Garden in Westminster, London, a small patch of green in the middle of a busy city, which feels like a very fitting place for these important conversations. So wherever you are [00:00:45] joining from, you are very welcome here and let's get into it.

[00:00:48] **Natasha:** Fundraising is often framed around targets and transactions, but at its heart it's really about relationships.

[00:00:56] **Natasha:** In episode three, we explore what it means to build [00:01:00] trust-based partnerships between funders and fundraisers, and why honesty, transparency, and long-term thinking matter more than ever.

Meet Sophia Cooke

[00:01:08] **Natasha:** Our first guest is my colleague, Dr. Sophia Cooke. The Strategic Initiatives Lead at the Environmental Funders Network.

[00:01:16] **Natasha:** Sophia is an expert in helping people and organisations take insights from research and put them into practise. She has a particular focus and interest on researching and improving funder and fundraiser [00:01:30] relationships. Let's head online to speak to Sophia.

[00:01:37] **Chloe:** Welcome to The Fundraisers Handbook, Sophia, and

[00:01:39] **Natasha:** thank you so much for joining us.

[00:01:42] **Sophia:** Thank you for the very kind introduction. [00:01:45]

[00:01:45] **Natasha:** so can you tell us a bit about yourself, maybe the journey your work has taken and how it has led you to EFN and, your focus on funder fundraiser relationships?

[00:01:58] **Sophia:** So, [00:02:00] I started off following a sort of typical career in wildlife conservation.

[00:02:05] **Sophia:** I did a PhD on birds, and then I shifted to having a bit more of a holistic approach [00:02:15] to to conservation became more interested in how we can improve environmental issues while also improving the lives of people. And that took me out to the Galapagos Island in Ecuador where I [00:02:30] worked and lived, for several years, thinking about how the islands could adopt the the UN sustainable development goals.

[00:02:40] **Sophia:** And while I was out there, I sort of noticed that there were various [00:02:45] community members working really hard on sort of conservation and sustainability projects. But, with very little funding usually being, you know, left out of a lot of conservation work on the ground. And meanwhile there's huge tourism in, in [00:03:00] Galapagos.

[00:03:01] **Sophia:** and so what I was seeing is lots of money coming into the islands, but very little of it actually reaching people who were trying to make, you know, big changes on the ground. So in partnership with a, a local NGO, I [00:03:15] ended up actually setting up an initiative to channel funding from, from tourists directly to, community members, to run sustainability projects and also provide any support that they needed.[00:03:30]

[00:03:31] **Sophia:** And I was helping local groups to apply for international grant funding as well. and it was great, you know, brought in quite a bit of money, saw some really fantastic projects, but it was [00:03:45] just, it was painfully obvious the entire time that the only reason these projects were getting any funding was because I was applying for them.

[00:03:52] Sophia: That the, the ways in which people are trying to communicate about their projects just don't fit with what funders are expecting to [00:04:00] see. the applications just aren't designed for people, you know, on the ground, grassroots groups. Those without, you know, career experience in fundraising and donor management.

[00:04:14] Sophia: and what I [00:04:15] could see was a huge amount of time being wasted. You know, these fantastic, fantastic local groups who should have just been spending all of their time out there doing the brilliant work they're doing were having to, you know, jump through hoops, rewrite information for different. [00:04:30] Funders, very burdensome reporting requirements.

[00:04:34] Sophia: And you know, I tried to take on as much of that as I could in the role that I was doing. I shouldn't have had to take on that work. That work shouldn't have existed. [00:04:45] so after a few years, I came back to the uk. Very determined to play my part in making environmental funding systems like more efficient and, and more inclusive.

[00:04:57] Sophia: and fortunately just as I did that a role with [00:05:00] EFN came up.

[00:05:01] Natasha: So you recently published a report, into the kind of effectiveness of. Funder and fundraiser relationships in the environment sector. and I wanted to ask a little bit [00:05:15] about maybe the background and the motivations behind that. and yeah, also if you could just tell us a little bit about the report.

[00:05:23] Sophia: Yeah, absolutely. So I, I mentioned to you that I sort of came back from [00:05:30] Galapagos full of determination to try and improve the funding sector and then your job magically came up. so I came into EFN covering your maternity leave. and so the focus of my first year, at EFN was stewarding the Green [00:05:45] Fundraisers Forum and because I was new, new to the network and new to the role I had

[00:05:52] Sophia: a load of different sort of one-to-one meetings with different people in the GFF to, to just get to know people and, and understand, [00:06:00] understand the sector a bit more. And it was really eyeopening. And I think maybe

because I, I was new and, you know, people had the opportunity to vent a little bit. I ended up [00:06:15] just hearing everyone's frustrations.

[00:06:18] Sophia: it and. And it was it, everything that I was hearing was what I had already seen in Galapagos and through my own experience. And it was, it was quite, it was almost shocking to me to [00:06:30] realise that even if you remove a lot of the, you know, barriers that grassroots groups are facing, and let's say, you know, you are a very experienced career fundraiser in the UK, still facing so many of the same [00:06:45] problems.

[00:06:45] Sophia: So it's like, okay. Who is this system designed for? and and one thing that really struck me, which I found very sad, was that a lot of the people talking to me about their frustrations [00:07:00] with fundraising and their just exhaustion were all saying very similar things, but seemed quite unaware that they were all saying very similar things.

[00:07:09] Sophia: And I heard quite a few people just say, Ugh. And you know, perhaps it's just me or. [00:07:15] You know, oh, I think I'm just not very good at this and that made me feel so sad because it is never, it's not the fault of the individual people. The, you know, it's the system. And so what I wanted to do was to just bring together all of this [00:07:30] information, centralise it, and then, you know, reflect it back.

[00:07:35] Sophia: and the main the main reason for that really was to, I think my main priority was to help environment [00:07:45] fundraisers understand it's not just them and to feel some, you know, solidarity. the second was that I really wanted to communicate clearly to funders. and this wasn't the first time that anything like this had been [00:08:00] published.

[00:08:00] Sophia: There were lots of other groups, you know, across the, the third sector who have published very interesting research into, you know, how funder- fundraiser relationships work. But this was the first time that, anyone who really landed it into the environment [00:08:15] sector. And I wanted to do that to particularly appeal to environmental funders.

[00:08:22] Sophia: and obviously just a a, a big thank you to everyone who contributed. I think we had 80 fundraisers and then 50 funders, contribute their

experiences [00:08:30] and, and knowledge. As just such a fantastic wealth of information that's come in that has really helped, you know, me, colleagues, and, and anyone who reads the report to just understand a little bit more about, about the, the challenges and, and the [00:08:45] opportunities that, that are present.

[00:08:46] **Sophia:** So thank you to everybody.

[00:08:48] **Natasha:** It's so true how, how I think the whole sector and the, the individuals operating within it can feel quite siloed and then it makes it quite hard for that kind of collective voice [00:09:00] to come through. yeah, because we're all kind of working quite individually and actually the power that comes from

[00:09:07] **Natasha:** collating that feedback and it's amazing how well received it has been, both by fundraisers but [00:09:15] also by funders.

[00:09:16] **Natasha:** Um, and so what are the key findings and areas that the report covers?

[00:09:22] **Sophia:** So it's quite broad. There's a lot of things in there in the report. We then sort of pulled together all of this information [00:09:30] into, four main.

[00:09:31] **Sophia:** Categories of, you know, issues that fundraisers face. The first was around funding availability. So sort of restrictions around eligibility criteria, for example, the big one, never enough funding [00:09:45] for core costs. and not enough funding for different approaches like advocacy work, research work, preliminary scoping, et cetera.

[00:09:56] **Sophia:** And then the second set of issues was around applications. [00:10:00] this was mostly around sort of awkward, time consuming application systems, with, you know, technological glitches, short time windows for applications, and often like far too much [00:10:15] detail being required for, for very small grants. And then we moved into thinking about the grant management.

[00:10:22] **Sophia:** And this section talks about trust and flexibility of, of funders, and then also reporting the [00:10:30] demands, on fundraisers for reporting that might be too frequent, and particularly burdensome. And then in the final section,

we talk about collaboration, and that's both collaboration between funders, [00:10:45] but also how funders can facilitate collaboration between grant holders.

[00:10:49] **Sophia:** We brought together all of these different, potential sort of solutions to all these challenges, and, came up with six, like cross [00:11:00] cutting approaches that we wanted to encourage funders to do. The first is around focusing on people and outcomes rather than projects and outputs. So, this is about, you know, funding all parts of the environment, sector, [00:11:15] ecosystem, all the activities needed, and all the, the people who, who want to do them.

[00:11:19] **Sophia:** Then underpin all funding behaviour with trust and flexibility, you know, philanthropic funders. Are able to be much more risk taking than others. [00:11:30] And so they can be much more catalytic if they, you know, choose to adopt more grant holder led approaches. I was keen to get this across. Their next approach was around making decisions based on a combination of long term thinking and urgency.

[00:11:44] **Sophia:** [00:11:45] So offering long-term funding, but also making decisions about that funding quickly. Don't let grant don't let applicants wait, you know, six, eight months to hear whether they've been successful or not. Because they can't plan. And then design and design [00:12:00] application and reporting processes as carefully as possible and relax the requirements where possible.

[00:12:07] **Sophia:** Don't make fundraisers jump through unnecessary time wasting hoops. be open to accepting a wide range of [00:12:15] applications, you know, different formats, and reporting types and reports that are written for other purposes. Then the other two approaches were around collaboration, collaborate as much as possible, work with other funders.

[00:12:27] **Sophia:** Think about pooled funds, think about coordinating [00:12:30] timelines, etc. Think about how to fill gaps in funding availability and create and embrace opportunities to hear from grant holders. And that that last one is exactly as it sounds. You know, we're really trying to encourage funders, not just to listen, [00:12:45] but to listen actively and authentically, to really care about the grant holder experience and modify your approaches based on feedback around that.

[00:12:56] **Natasha:** I can, basically hear all of [00:13:00] the fundraisers collectively sighing with relief just at those, that set of recommendations.

[00:13:06] **Natasha:** What if we do a similar report the other way round? What, what about the kind of funders experience? What are the challenges for them?

[00:13:14] **Sophia:** [00:13:15] So that is exactly what we're looking into at the moment, actually.

[00:13:19] **Sophia:** So I thought, okay, well let's, let's spin this around and go and speak to funders and ask. Ask where the difficulties lie in implementing these [00:13:30] recommendations. It's easy to imagine when you're in the position of fundraising that funders have all the power and they can do whatever they want. and that often is not the case.

[00:13:42] **Sophia:** Also, I thought it would be really nice [00:13:45] to learn more from the funders who were already adopting these practises and sort of how they were doing that and be able to share that with other funders. So we surveyed and interviewed 50 funders to ask them about each of [00:14:00] those, four sets of issues in the first report to explore their progress in addressing those issues.

[00:14:08] **Sophia:** Think about what had helped or was helping. And, think about where the, where the challenges lay. [00:14:15] It's been a lot of interesting findings. I won't give away too much now because, you know, still kind of at the analysis stage, but what I will say is despite the various, you know, challenges and barriers [00:14:30] that funders have raised, I've seen a lot of evidence that funders really wanting to learn from each other as well.

[00:14:38] **Sophia:** And so going forward, I think there's quite a bit that we as EFN can do. [00:14:45]

[00:14:45] **Natasha:** Absolutely. And it does feel like, gosh, wouldn't it help things if, fundraisers had experiences of funding and funders had experiences of fundraising? That [00:15:00] feels like that would really maybe help to see, you know, the other side.

[00:15:04] **Natasha:** Um, but one thing that this, kind of research has led to, which has been amazing is, bringing together funders and fundraisers in the same [00:15:15] room to have kind of in-person conversations. Yeah. I was wondering if, if you had any thoughts about, yeah, the research leading to those those kinds of events.

[00:15:24] **Sophia:** Yeah, so we've had two events so far where we've brought funders and fundraisers together. And I [00:15:30] think it's fair to say there was a bit of nervousness before these, about, you know, whether people would use the opportunity to sort of talk about ongoing projects or perhaps pitch, or perhaps funders would be avoiding particular fundraisers that they've maybe turned down in the past.[00:15:45]

[00:15:45] **Sophia:** and actually none of that happened. It was, it was beautiful. it was really, really fantastic to see funders and fundraisers come together, leave their organisations at the door, leave their work at the door, and just think about the [00:16:00] bigger picture collaboratively. And I really think more of that is needed.

[00:16:03] **Sophia:** Like I would love to, I would love to see a future where the power dynamics just don't exist. where, you know, the, the conversations and the [00:16:15] relationships between funders and fundraisers are actually equitable, are actually, you know, transparent. and they are, are truly seen as partners, which they should be.

[00:16:25] **Sophia:** You know, that like funders cannot achieve any, any of the work [00:16:30] they want to do without the organisations who are, you know, implementing the, the work on the ground. and I think if we can get to a place where, where we can shift those power dynamics, then together. [00:16:45] Funders and fundraisers can make the most of, of every pound available.

[00:16:49] **Natasha:** Thank you so much, Sophia. I just feel like the, the clarity with which you can see the whole ecosystem is really, really amazing. You know, it, it is [00:17:00] research, but it feels really kind of grounded in people's experiences and, yeah, held with a lot of compassion. So thank you so much. It was really, really, really enjoyable, speaking with

[00:17:12] **Chloe:** you on The Fundraisers Handbook.

[00:17:14] **Sophia:** Always a [00:17:15] pleasure, Natasha. Thank you.

Meet Aruna Bahia

[00:17:20] **Natasha:** I'm so pleased to introduce our second guest, Aruna Bahir. Aruna is the Sustainability Lead at The Co-op Foundation. She's here today [00:17:30] to bring the funder perspective on trust-based philanthropy and her experience working and building authentic relationships with grant partners. Thank you so much for joining us

[00:17:40] **Natasha:** aruna.

[00:17:41] **Aruna:** Thanks for having me.

[00:17:42] **Natasha:** Um, so can you start by, [00:17:45] just sharing a bit about your journey to the work that you are doing today at the Co-op foundation and beyond as well?

[00:17:52] **Aruna:** Yeah, so I started out actually working in the Co-op business. and I worked in the sustainability department there, so it's ethics, [00:18:00] sustainability, and policy is all grouped together as one team.

[00:18:03] **Aruna:** And I worked in sort of sustainable sourcing and our climate plan, so the net zero plan for the Co-op. and then there was an opportunity that came about to kind of jump over the fence into our [00:18:15] grant making team. so yeah, the opportunity came about because there was a partnership called the Carbon Innovation Fund.

[00:18:23] **Aruna:** that was a partnership between Co-op Food and Co-op Foundation. It was the first of its kind. This was back in [00:18:30] 2021 and it was the first time we were as the foundation, intentionally significantly investing in or giving out grants, with a sustainability or environmental lens to it. So as soon as I saw that, I was like, [00:18:45] I want that job.

[00:18:46] **Natasha:** And so what about your kind of love of nature and interest in sustainability? Where did that come from?

[00:18:52] **Aruna:** I think that came from loving the ocean and the sea from a very, very young age. My dad always loved the ocean and [00:19:00] tried to get us there as much as possible, which is very tricky when you're from Derby, which is the furthest from the ocean you can possibly live.

[00:19:07] **Aruna:** but now I live in Brighton, so I have that amazing pull to the ocean and can see it every day, which I love. but from a very young age, [00:19:15] I was just fascinated with marine life. Like the underwater world and how much we actually don't know about it, as well as how much we do know about it. and as soon as I could, I saved up as much money as possible and learned how to scuba dive so that I could [00:19:30] support organisations.

[00:19:32] **Aruna:** It was an organisation in The Bahamas to plant replant, coral reefs. and survey the marine life down there as well, which was suffering at the time and obviously still is unfortunately. [00:19:45] and that really instilled my passion for kind of environment and nature.

[00:19:49] **Natasha:** Gosh, that's amazing.

[00:19:50] **Natasha:** And so the Co-op foundation talks a lot about kind of building, a fairer and more sustainable future with young people.

[00:19:58] **Natasha:** Hmm. So how does [00:20:00] that vision. Kind of shape the way that you approach relationships with fundraisers and also with kind of partner organisations.

[00:20:08] **Aruna:** Yeah, I think, I think the key thing to pull out there is the, with young people. [00:20:15] and I think that's what we do quite differently to other funders. So we have a really heavy focus on supporting young people, championing young people, like giving them a seat at the table or actually going [00:20:30] further and letting them sit at the head of the table, oftentimes as well.

[00:20:34] **Aruna:** So. When it comes to relationships with fundraisers or funded partners as we call them, you may call them grantees, we say funded partners.

[00:20:45] we try to bring young people on that journey with us. and we've slowly been passing the power. We've been like incrementally increasing the power that we give to young people since we started working with them in 2022.

[00:20:57] **Aruna:** So we have a, a large group of [00:21:00] young people called the Future Communities Collective, and we have been building their knowledge and confidence and ability to essentially grant make, So that eventually they are now in a position where they are making [00:21:15] decisions, they're attending assessment calls, interviews with potential funded partners.

[00:21:20] **Aruna:** They're reading the shortlist, they're reading initial applications. So young people are having a huge, you know, they, they have a huge amount of power now when it comes to [00:21:30] that funded partner relationship. they're literally picking sometimes who we fund and giving good rationales as to why. and it, there's a very good reason for it because they're the ones that are going to inherit the impact, you know, of the funding [00:21:45] decisions that we make.

[00:21:47] **Aruna:** so it makes total sense to have them there.

[00:21:49] **Natasha:** Yeah, absolutely.

[00:21:51] **Natasha:** Um, and a lot of, charities that are kind of working in the sector at the moment still feel that pressure to sort of appear perfect in funding applications. so how do you kind of create a culture where organisations feel, I guess safe and where young people maybe feel safe

[00:22:11] **Natasha:** to be honest about maybe challenges? [00:22:15] Or failures even, or just uncertainty?

[00:22:18] **Aruna:** Yeah, and I totally get it because. I'm a trustee at an organisation as well. an environmental organisation called We Are Grow and you know, there is a pressure to appear [00:22:30] perfect, in your application, when you're having catchups, that sort of thing.

[00:22:34] **Aruna:** So I completely see it from the other side. And, you know, maybe a fundraiser would roll their eyes when I say this, but what I truly do believe is to be as open and honest as possible with [00:22:45] whoever is funding

you, and to try and make it feel more like a conversation rather than, you know, you're being assessed and that there's boxes that need to be ticked.

[00:22:55] Aruna: at the foundation, at Co-op foundation, our approach to learning and evaluation [00:23:00] is we, we take it very, very seriously. but when I say we take it seriously, we, we want learning to happen. We want failure to happen. Actually, when I met with a project or an organisation that's just telling me that [00:23:15] their five year plan is going swimmingly and not one penny out of that budget has moved and there's been no changes and everything's gone well

[00:23:22] Aruna: to me, that raises far more alarm bells than somebody that has said, actually, scrap that can we send you a new [00:23:30] project plan because X, Y, Z happened and it makes no sense to do this anymore. So being able to show up as your whole self as an organisation and say we might not have figured that thing out yet, but that's what we're using the money to do.

[00:23:43] Aruna: Or this is what we think we're going [00:23:45] to do, but we've predicted that X, Y, and Z might happen. You know, being really honest about that is the most important thing for us.

[00:23:51] Natasha: So how has that experience kind of influenced the way you now show up as a funder? and also what, what do you think makes a good [00:24:00] fundraiser?

[00:24:01] Aruna: Yeah, good question. I think, I honestly think if you work, if you have the privilege of working in funding you should do your time as a fundraiser. I really think that, deeply fundraising is, [00:24:15] is not for the week. and anyone that's done it will know that, you have to be glass half full all the time, even when you've been rejected, you know, every day for a month or something like that.

[00:24:25] Aruna: So it makes me approach my job with a lot more [00:24:30] patience and a lot more empathy. And your second question was, what makes a good fundraiser? It's probably not right for me to say that, but I would say from my experiences of, [00:24:45] maybe interviewing potential applicants or actually reading initial applications, often it's fundraisers that are at arms length a little bit from the organisation, or maybe it's the project that they're trying to do, or, you

know, [00:25:00] maybe there's a new strategy in the organisation, somebody that's at arm's length.

[00:25:04] **Aruna**: I feel can communicate their ambition, their objectives much more clearly than somebody that's doing that work day to day. [00:25:15] And it, it sounds so basic, but just starting at the beginning and explaining the problem, in plain English, not having to use jargon to impress anybody, it's really important.

[00:25:26] **Aruna**: You also have to think about who's reading the application. Sometimes [00:25:30] it's going to be a specialist. In our case, it's gonna be a generalist, and maybe a young person as well that will have, you know, not the experience of seaweed farming, for example. so yeah, just taking it step by step from the start.

[00:25:44] **Aruna**: I think [00:25:45] it's such basic advice, but that's the best fundraising I've seen.

[00:25:49] **Natasha**: I totally agree, and it's interesting because, sometimes I can sense quite a lot of imposter syndrome within fundraisers of, oh, you know, I'm not the subject [00:26:00] expert. Yes. But actually that's, that's the strength is because you can then

[00:26:03] **Aruna**: Yeah.

[00:26:04] **Natasha**: Have that perspective to actually tell the story really well.

[00:26:07] **Aruna**: Yeah. And the reason I just said seaweed, I've just realised why is we've, we, I've recently come to the end of a relationship, with an [00:26:15] organisation called Câr-y-Môr , which translates to, for the love of the Sea in Welsh, and they're a multitrophic seaweed farm in Pembrokeshire and Tracy,

[00:26:25] **Aruna**: she will say herself, I, I can say this on this podcast, did not have any experience of [00:26:30] seaweed farming at all, but is just an excellent fundraiser and an excellent communicator. and that application that we got stood out, we got a lot of seaweed farming applications that year, and that one just was head and shoulders above [00:26:45] all the others.

[00:26:46] **Aruna:** Not because the organisation was more advanced or had more money or was more flashy or had videos just because it made sense. That's all.

[00:26:56] **Natasha:** Yeah. So important. Yeah. That kind of storytelling aspect of the work. [00:27:00]

[00:27:00] **Natasha:** Um, and one of the hardest moments in funding relationships, can be the moment where the, the funding sadly, comes to an end.

[00:27:08] **Natasha:** Yeah. so how do you think about kind of responsible exits, managing [00:27:15] expectations, and I guess ending partnerships with care?

[00:27:19] **Aruna:** Yeah. Answer is in your question. So managing expectations I think is probably the most important part of this. [00:27:30] Whether you can or cannot offer continuation funding is really important to set from the get go if you can.

[00:27:37] **Aruna:** I think as a funder, and also I like to remind organisations, you know, if there is continuation funding or not, [00:27:45] that your success, whatever that is, or performance, as a grant partner from the Co-op Foundation, does not determine whether we give you more money or not. It, it, that, that is completely unrelated and it is not something to think [00:28:00] about at all.

[00:28:01] **Aruna:** so I think that's a really important thing to highlight. we also, we bring our partners together, so there'll be a common thread. So for example, on the Carbon Innovation Fund, it'll be reducing emissions within farming. sometimes, you know, [00:28:15] the, the more specific niches there, so let's say alternative, fertilisers, we bring that cohort together on an annual basis in person so that they can collaborate with one another and support each other and hopefully support each other [00:28:30] post the end of the grant relationship with us as well.

[00:28:32] **Aruna:** So they're strengthening their network via. As the Co-op Foundation.

[00:28:38] **Natasha:** Amazing.

[00:28:39] **Natasha:** And one final question, if you could change one thing about the culture of funder fundraiser relationships across the sector, what would it be? And then I feel like I keep asking you two questions in one. but what advice would you give to both funders and fundraisers trying to build more trusting relationships?

[00:29:00] **Aruna:** I would say for. it's for both, I guess, but it's, it is more for funders, and it, it will impact fundraisers is.

[00:29:13] **Aruna:** I appreciate that a lot of funders are a little bit more risk averse and might have good reasons for that, et cetera. And it means that potentially they haven't dipped their toe into a little bit more of a trusting, open, collaborative relationship with, with fundraisers or, or charities, et cetera.

[00:29:31] **Aruna:** And a way to kind of mitigate that risk, which will benefit both parties is to collaborate with other funders. So. We are part of a collaborative called Roots and Routes, which is with [00:29:45] Energy Saving Trust, OVO Foundation, Blagrove Trust, and Impatience Earth. And we've all worked together to do some, you know, what would be deemed as risky funding.

[00:29:57] **Aruna:** It's it's funding to youth led, [00:30:00] grassroots organisations and young people directly on climate justice, for example. if you felt like that. Was really risky for your organisation going in with a collaborative really helps to smooth over that risk [00:30:15] and can help sell it into your trustees, et cetera, and you can test the water.

[00:30:19] **Aruna:** And then for fundraisers that are in that position like that, are the recipients of those grants. They only had to write one grant application rather than five. Five [00:30:30] funders who wanted to work in exactly the same direction and would've run five almost identical different funds. They, they only had to write one.

[00:30:37] **Aruna:** so it reduces the burden there, but also the exposure that they'll then have across those five funders is amazing. [00:30:45] Great. You know, we now know who you are. We know the amazing work you do. It's likely we're gonna cross paths again. So I think collaboration basically, and the impact of that will really benefit.

[00:30:57] Aruna: Organisations and funders to, to [00:31:00] build that trusting relationship.

[00:31:01] Natasha: Yeah, absolutely. And perhaps there's no surprise as a network, we just massively see the value of collaboration and I think fundraisers have yeah, been calling for that for so long. That just all seems to make [00:31:15] so much sense to kind of fund in this way.

[00:31:18] Natasha: Uh, I guess like the, the thought that's coming to mind is. Why, why isn't everyone doing this? Like, are there downsides?

[00:31:25] Aruna: Yeah, good question. I think there is a deep fear of funding in a [00:31:30] flexible, you know, largely unrestricted, trusting way. perhaps, you know, if you are very outcomes heavy or very attached to.

[00:31:40] Aruna: Reach and, and numbers and things like that, or, you know, tonnes of [00:31:45] CO2 avoided through this project. there, there will be a fear that being so trusting and flexible will not give you those numbers. But I think, I. The I of R commitments actually are a really good example of a pledge that lots of [00:32:00] funders have signed up to and are signing up to, which kind of nudge funders towards a more open, collaborative, trusting way of thinking that is less outcome heavy.

[00:32:11] Aruna: And it's important to note that being like that still works, [00:32:15] believe it or not. So, you know. Not breathing down someone's neck every day, asking for reporting outcomes does help organisations to build a stronger base to be able to thrive in doing what they're doing. [00:32:30] And actually, there's probably an argument to say that the outcomes are going to be even better if you give them a little bit of time and a little bit of trust.

[00:32:37] Aruna: It goes a long way.

[00:32:38] Natasha: Thank you so much, Aruna, for yeah. Really, really fascinating insights into the life of, of funder. [00:32:45] I feel like you are quite a, a breath of fresh air within this sector and yeah, it comes very easefully and yeah, really admire how, how boldly, your kind of funding in a really great, innovative, [00:33:00] wonderful way.

[00:33:01] **Natasha:** So yeah, thank you so much for, yeah, sharing all of your insights with us and for coming here today.

[00:33:06] **Aruna:** Welcome. Thank you so much for having me.

Meet Steve Jones

[00:33:14] **Natasha:** I'm delighted to [00:33:15] welcome Steve Jones, Director of Fundraising & Operations at ORCA, the Whale and Dolphin Charity. Steve is also a subgroup leader of the Green Fundraisers Forum specialising in the art of corporate fundraising. From cultivating strong [00:33:30] relationships with funders to navigating the power dynamics within a funder and grantee relationship, Steve is here to share how it's possible to maintain a healthy culture and stay true to yourself.

[00:33:41] **Natasha:** It's really lovely to see you, Steve. Thank you so much for coming.

[00:33:44] **Steve:** [00:33:45] Thank you, Natasha. Really happy to be here and happy to be part of this.

[00:33:48] **Natasha:** So you have worked across corporate partnerships, environmental fundraising, and also operations at ORCA. so what first drew you [00:34:00] into, into this work?

[00:34:02] **Steve:** It's really interesting because when I was a kid, I wanted to be a marine biologist and I was rubbish at science, so I never had the chance to do it.

[00:34:10] **Steve:** Never really thought any more of it. And then as I was going through my career, I worked in [00:34:15] hospitality and worked in sports. but in the background, I was volunteering as a trustee for this small charity. And I did that for four years. My term came to an end and I decided I wanted to go and work full-time in the sec.

[00:34:28] **Steve:** I wanted to go pro. And so I [00:34:30] started looking around for opportunities and the first thing that popped up, was a head of partnerships at a little whale and dolphin charity that I'd never heard of and I thought I could

probably do that. And I managed to convince our CEO that I could, and she took a chance on me.

[00:34:43] **Steve:** And I guess the rest is [00:34:45] history. 10 years later.

[00:34:46] **Natasha:** Amazing. And where does the love of, I guess marine biology and marine sciences and the world of the oceans come from? Or do you not know?

[00:34:56] **Steve:** I mean, it was something that, as long as I can remember I was [00:35:00] interested in, but it was just something I was always fascinated with.

[00:35:03] **Steve:** Don't tell anyone. It was actually sharks that I really loved when I was a kid. so, but they're almost as cool as whales and dolphins.

[00:35:11] **Natasha:** Lovely.

[00:35:12] **Natasha:** And you've, you've kind of spoken about, fundraising relationships and, and how they can be quite transactional, I guess. What do you feel is sort of broken in that kind of funder fundraiser?

[00:35:26] **Natasha:** Traditional dynamic?

[00:35:28] **Steve:** I think that there's a, a [00:35:30] big power imbalance and I think that that's not necessarily always intentional. It's something that can happen, you know, organically and naturally. and it can be a shame because I think that it's detrimental to both sides of the [00:35:45] relationship. And I think that a lot of the construction of partnerships, whether it's corporate or you know, other funder relationships in that construction is, is the, the opportunity to stop that imbalance from happening at the earlier stage and [00:36:00] create a, a robust and resilient partnership that's really mutually beneficial.

[00:36:04] **Steve:** And it's built on, on respect, but also productive, honest foundation so that everyone goes in with open eyes knowing what they want to get out of that relationship.

[00:36:13] **Natasha:** So in some of [00:36:15] the corporate fundraising training sessions that you've done for the Green Fundraisers forum, you've spoken about fundraisers kind of learning to speak the language of funders and really immerse themselves in, in the world of the funder [00:36:30] that they're speaking to.

[00:36:31] **Natasha:** so why do you kind of recommend that as an approach and what does it look like in practise, and particularly in corporate fundraising, which is your specialism?

[00:36:42] **Steve:** It's a really important, and I'd say [00:36:45] fundamental part of, of accessing companies because you have to be credible. And when we are talking to corporate partners, whether it's as donors or whether we are looking to create impact from our partnerships with them, we need to understand their world.

[00:36:59] **Steve:** We need to [00:37:00] understand what's important to them, and we need to understand what makes them tick. And so one of the things we've done at ORCA is we immerse ourselves in the shipping industry. You know, we are very well known in the sector because we have spent a lot of time on [00:37:15] ships, a lot of time in shipping events, getting to know what challenges the industry faces at a wider level so we can then understand how we can make impact and build relationships that can have positive outcomes for whales and dolphins, and [00:37:30] create that conservation impact.

[00:37:32] **Steve:** So when we talk about building relationships at the start of your corporate fundraising journey, or if you're looking at a strategic refresh, one of the first things I would always say to people is target an [00:37:45] industry. Pick one sector to target, and then go to their events. Go to their spaces, go to where they live and eat and breathe and get to know them.

[00:37:53] **Steve:** Understand what's important to them because you will build really robust partnerships with people when you take that [00:38:00] approach. They'll be far less transactional, there'll be far higher impact, and they will last a lot longer, and be a lot more productive for both partners, not just for you.

[00:38:10] **Natasha:** Amazing.

[00:38:11] **Natasha:** And so, yeah, you've just mentioned there, that you've worked kind of [00:38:15] really closely with the shipping industry. I know you speak at some panel events, at conferences and things like that. and that's the approach that you've kind of taken to, as a focus because of your focus on protecting whales and dolphins.

[00:38:29] **Natasha:** [00:38:30] so what has collaborating with corporates kind of taught you about credibility, trust, influence? And why do you think constructive feedback between funders and fundraisers is so rare? So how could, [00:38:45] the sector kind of encourage more openness between yeah, the funder and the grantee?

[00:38:51] **Steve:** I think it's a really

[00:38:52] **Steve:** good question, because it's such an opportune moment as we see the funding landscape changing so dramatically across so many different [00:39:00] sort of set subsections of fundraising. There's a lot of work that can be done to, to, to improve here. we, I, I say a lot to companies, friends are honest with each other.

[00:39:11] **Steve:** Now we are not always honest in public. We won't go to the [00:39:15] press if we think someone's done something wrong. But if we disagree with one of our partners, we will sit down with them and we will tell them and we'll explain why. And we'll explain what our concerns are and why those concerns are there. And that's as a point of starting a dialogue, [00:39:30] starting a discussion, and hopefully moving towards

[00:39:33] **Steve:** a better outcome from a conservation perspective, whether that's a hundred percent of the solution, whether it's 50%, whether it's only 10%, is moving that needle in the right direction. And I think that [00:39:45] any time there is a, a relationship between a funder and a fundee, whether it is grants, trust, foundations, corporates, major donors

[00:39:54] **Steve:** there is a real importance in creating honesty and transparency within that relationship. [00:40:00] And actually if we can embed more of that into the, the funding landscape, I think we will have more resilient funder fundee

partnerships that are gonna lead to better impact and hopefully try and address some of the [00:40:15] imbalances that we see at the moment.

[00:40:16] **Natasha:** Yeah, and it's really interesting talking about that approach of, friends are honest with each other, but we have our conversations in, in behind closed doors, but we're still having those conversations. And at EFN we are [00:40:30] we feel our role as a network is to, understand that we need so many different strategies and, ways of, of working to tackle the crisis.

[00:40:41] **Natasha:** And we work with some amazing people who are very [00:40:45] vocal at calling out and who actually do that through public shaming and through going to the press and through, yeah kind of public protest, but then others who have very different, approaches like yours. And it's really [00:41:00] interesting to see the range of strategies and to understand that they all, they all have their value, as well.

[00:41:06] **Natasha:** Yeah,

[00:41:07] **Steve:** and, and that's a definitely a good point to raise is that it's a continuum. Everyone has a place, you know, we are pragmatic, [00:41:15] collaborative, we work with other organisations in the shipping industry. We work with other NGOs. There are others that are more vocal, you know, more public facing. And that's really, really important as well.

[00:41:25] **Steve:** It requires all of those approaches for us to find solutions. These are wicked [00:41:30] problems that we need to address and without a range of solutions, we're never gonna make progress. So it isn't just one approach, but it is about still having an honest discussion, whether it's campaigning in public or whether it's behind closed doors.[00:41:45]

[00:41:45] **Steve:** Being able to say to people, this is what we think you can do better. This is where we think that there's opportunities.

[00:41:51] **Natasha:** Um, and there's often, a kind of power imbalance between, we've sort of touched on this already, but between people asking for money and then the people [00:42:00] who are controlling it. so what is your personal experience with navigating these kinds of power dynamics?

[00:42:08] **Steve:** I think that it's really important to understand the mutual value. That you give as an [00:42:15] organisation. When we go to a corporate, when we go to a funder, we feel like we're supplicant. We are asking for money, and therefore we should be 'Yes sir. Yes sir. Three bags full, sir.' And actually we give value. So to a grant funder, they exist [00:42:30] to support organisations, so

[00:42:32] **Steve:** if you're not there they can't do that. To a corporate partner they've got something they want to achieve from a relationship, and making sure that you have your value front and centre when you are having these discussions is really [00:42:45] important because it will empower you to realise you are bringing something to the table as well.

[00:42:50] **Steve:** Show the value of the work that you are doing and show the value that you are delivering to someone because it's not a gift, it's an investment. They're investing in your cause and [00:43:00] in your organisation, and if you can show them what the return on that investment is, it's, it's far more even and it's far more balanced as a relationship.

[00:43:09] **Natasha:** And we have been kind of following your journey from afar and through, [00:43:15] well, you know, your journey as a, a Green Fundraiser subgroup leader. We follow you on LinkedIn and you go to some pretty cool events.

[00:43:26] **Natasha:** Um, you're often at sea, but what are the kind of pinch me moments that you've. Or can you think of one particular pinch me moment that you've had in your, work at ORCA so far?

[00:43:37] **Steve:** There are so many and it is hard to pick out one. but I am lucky because working for ORCA, we [00:43:45] have lots of amazing places that we work in the world, lots of places that we protect that really need support. and, and some of them are amazing places that very few people get to visit. So I guess the pinch me moment that really stands out above almost all [00:44:00] others is when I went to Antarctica.

[00:44:02] **Steve:** so I've been to Antarctica twice working for ORCA, and we do a lot of work in the Southern Ocean studying whales and dolphins and looking particularly at large whale populations and how they're recovering. and I was in

an [00:44:15] area called Neko Harbour, and the Antarctic Peninsula, and we were sailing out and we saw a humpback whale.

[00:44:22] **Steve:** Mother and calf.

[00:44:24] **Sophia:** Wow.

[00:44:24] **Steve:** And they were just swimming gently through the water. So the ship stopped just so we could watch them for a [00:44:30] few moments, and the mother started to lunge to the surface to feed, and then a second later, the baby would lunge to the surface as well. And what became clear was the mother was teaching the calf how to feed.

[00:44:42] **Steve:** And that moment really hammered [00:44:45] home how important it is for us to understand and study these animals, because you could see in that moment how these tiny little relationships between a mother and a calf are so profound and so important for the [00:45:00] survival of that entire species, but also the places they need to be protected, they need to be pristine.

[00:45:06] **Steve:** Because if we have too many people there, if we have too much activity there, that humpback, whale mother can't teach the calf, you know, you disturb them, you drive them away from a [00:45:15] vital habitat and all of a sudden it makes it that much harder for their population to thrive. So an amazing experience, but also one that's really humbling and, and really reminded me of how important the work ORCA does is and how proud I am to be a part of that.

[00:45:28] **Natasha:** Yeah, absolutely. What [00:45:30] an incredible moment and how varied a fundraiser's life can be. I mean, like one moment you can be stacking chairs after an event and then the next moment, seeing something as beautiful as that.

[00:45:42] **Natasha:** So Steve, you also run a, a subgroup of the Green Fundraisers Forum that particularly focuses on, corporate fundraising.

[00:45:52] **Natasha:** We call it the. Corporate fundraising, working group. and I just wondered if you could talk a little bit about that group, [00:46:00] maybe some

of the, conversations and topics that have come up in that. and I guess, yeah, the, the philosophy behind it and why we kind of wanted to set up a corporate fundraising working group as part of the GFF.

[00:46:13] **Steve:** I'd be delighted actually, to talk about [00:46:15] that because it's something that's really important to me and something I'm really pleased to be a part of. I think that. During my time involved with the Green Fundraisers Forum, we've had lots of people come and ask for advice and support, and what became clear is there's an appetite for [00:46:30] support with corporate fundraising, but perhaps no one place to go to get that help.

[00:46:35] **Steve:** particularly for green fundraisers who perhaps have slightly different challenges with ethical considerations, you know, sources of money which perhaps don't [00:46:45] apply quite so much to other, other sectors of the charity, space. So we decided to create a space for corporate fundraisers, whether they're at the beginning of their journey or whether they're more experienced, where they could come together a safe space to discuss ideas, to [00:47:00] discuss thoughts.

[00:47:00] **Steve:** It's not recorded, and we capture some thoughts and share them as part of the notes afterwards. But really it's about an exchange of ideas. and it's been really, really well received. It's really well attended. We have some really great [00:47:15] discussions. And actually, I'm more a facilitator than anything. Of course, I'm happy to share my two pennies, but it's actually the people in the group that are really delivering the most value and giving the most peer to peer advice.

[00:47:26] **Steve:** and I think it's a, a lovely little community, sub-community [00:47:30] that's forming as part of the Green Fundraisers Forum.

[00:47:32] **Natasha:** Absolutely. It's yeah an incredible community. Yeah. And if you are, if you are interested as well in joining Steve's amazing corporate fundraising working group that's part of the [00:47:45] Green Fundraisers Forum, I would highly recommend it as well as the, the sessions that we have

[00:47:51] **Natasha:** recorded online as well.

[00:47:53] **Natasha:** Um, so finally, if you had kind of one piece of advice, for fundraisers embarking on a corporate fundraising journey, what would that one piece of advice be?

[00:48:06] **Steve:** I think that the one thing that you can do as a corporate fundraiser is, is really not be afraid to [00:48:15] fail. You know, it sounds very, you know, Silicon Valley tech bro, right?

[00:48:19] **Steve:** But you want to fail fast and break things. You know, you want to get to all through all of the ideas that aren't gonna work until you find the one that does. You know? And if one in 10 ideas [00:48:30] works, you want those 10 ideas out there as quickly as possible. You know, innovation is something that's really attractive to corporate

[00:48:37] **Steve:** partners, they want something different. Every single one of them wants to be special. They want to have a story that they can tell that no one else can tell. And so [00:48:45] they're always going to be open to innovation. And so think about something different. Think about embedding impact if you are if your cause has a particular industry where you can build impact, target that industry, talk to them about impact as well [00:49:00] as the fundraising.

[00:49:01] **Steve:** Make it a virtuous cycle so that they can see value to their actual business and their industry as well as being able to hit their ESG goals and their sustainability goals.

[00:49:12] **Natasha:** Thank you so much, Steve. It's been really, really [00:49:15] just delightful speaking with you today.

[00:49:17] **Steve:** Thank you to Natasha and thank you to EFN and the Green Fundraising Forum for all of the good work they do to support fundraisers.

[00:49:23] **Steve:** It's a great organisation to be a part of.[00:49:30]

Nature Connection Exercise

[00:49:30] **Natasha:** We'd now love to bring in Andy and Chloe from Change in Nature to guide us through a short nature connection exercise. They will help

ground us in today's themes, reflect on what we've heard, and explore how we might want to integrate some of the learnings into [00:49:45] our work. Over to you, Andy and Chloe.

[00:49:49] **Chloe:** Hi, I'm Chloe.

[00:49:50] **Andy:** I'm Andy.

[00:49:52] **Chloe:** We are Change In Nature and we take environmentalists out into nature so that they can bring nature's voice back [00:50:00] into environmentalism. And, today's episode has been all about building meaningful relationships, kind of long-term, reciprocal trust, based relationships. And, [00:50:15] something that a lot of people come to us for is to help nurture their relationship with the natural world.

[00:50:24] **Chloe:** And there's this term, right, that's kind of out there in common, use nature [00:50:30] connection. We all need to reconnect with nature because I think there's a, a dawning realisation that people have that at the root cause of a lot of our problems is that we are not relating, in a very [00:50:45] reciprocal or respectful or love filled way with the rest of our living kin on this planet.

[00:50:54] **Chloe:** Um, what does nature connection mean to you, Andy?

[00:50:58] **Andy:** Well, I think something that often [00:51:00] gets talked about is connection to self, connection to community and connection to the wider life. And, for me it's about all three. And I think what's so surprising about when people come with us into nature is they're [00:51:15] maybe looking for connection to the, the wider ecosystem, but they kind of maybe weren't expecting so much connection with others and real connection to yourself as well.

[00:51:24] **Chloe:** Hmm. Yeah. And, and by connection to self, I think for me that often means like, [00:51:30] wow, what, what am I really, what is my sense of purpose and, and what do I wanna do to make a difference, at this time? But, so I think I, I've even maybe, 'cause I've got a bit of an analytical brain as you know, but I've wanted to really unpack that word [00:51:45] connection for a long time.

[00:51:46] **Chloe:** 'cause people, it gets bandied around a lot and it's like, what does connection really mean? Like, what does it mean to be in a good, healthy relationship, with either another human or another [00:52:00] species. And I'm not gonna go into the whole, five part framework that I came up with. 'cause I think that's probably too much for where people's brains are right now at the end of the episode.

[00:52:11] **Chloe:** But I just wanted to maybe pull out [00:52:15] three strands. So for me, like a really foundational part of like, almost, it's almost like the base layer of a relationship is, attention. So giving each other like [00:52:30] real presence and attention and, or maybe you could share that quote that we like quite a lot.

[00:52:35] **Andy:** So, Simone Weil: Attention is the purest and rarest form of generosity.

[00:52:42] **Chloe:** Yeah. And it's, that's such a lovely, [00:52:45] lovely quote. So it's like, and, and anyone who's interacted with a child will know this intuitively, right? Like, number one baseline requirement they have is, can I have your full attention please? So it's, it's, if we're going out into nature, it's like that's the, [00:53:00] the base layer of the relationship.

[00:53:02] **Chloe:** Like, can we bring our full attention and curiosity? Then another strand that I wanna bring in is about us like noticing our interdependence [00:53:15] and and our sense of belonging within. We are not outside of nature. We are totally inde interdependent, and we are part of the whole thing that we belong here as much as any other species and really cultivating that [00:53:30] sense of belonging.

[00:53:32] **Chloe:** But the third one that I think I really want to draw out for, this week's episode is around reciprocity. Because I think, you know, for many of us, we might go out [00:53:45] into nature. We might pay attention, we might know that we're interdependent. We might even feel a sense of belonging, but we might genuinely, really struggle to think, what am I bringing to this relationship?

[00:53:58] **Chloe:** Like what's my [00:54:00] nature is giving me so much? How can I show up reciprocally? And sometimes it can be hard to know that if you're

not an ecologist, but I think we can take a bit of inspiration from our friend the beaver.

[00:54:14] **Chloe:** So I'd love you to maybe talk about, beavers for a bit, Andy, because we take people out sometimes

[00:54:22] **Chloe:** some pretty amazing rewilding sites. One of the sites we go to has beavers, and maybe you could share with us a bit about how [00:54:30] beavers through their way of being are kind of giving back and being reciprocal.

[00:54:34] **Andy:** So we take people onto this site on Dartmoor and we've been doing it for about 10 years and there's, there was this tiny trickle of a stream, like [00:54:45] really narrow stream, probably about as wide as this fire and beavers have been introduced and.

[00:54:50] **Andy:** I cannot believe. I went there three months after the beavers were introduced and the ecosystem had totally changed. There was these [00:55:00] huge pools of water then, and so much diversity and wildlife had returned to that area. There was so many more birds and butterflies. There were dragonflies. You could like really hear the hum of insects.

[00:55:14] **Andy:** [00:55:15] You could hear frogs. And it was just fish had

[00:55:18] **Chloe:** returned to the water as well.

[00:55:19] **Andy:** Fish herons. It was really beautiful and some people say beavers are the givers of life. And that's what it felt like, that these [00:55:30] four beings had totally transformed the landscape.

[00:55:34] **Chloe:** Yeah, and they've done so by being ecosystem engineers.

[00:55:39] **Chloe:** So they've engineered an ecosystem that creates the possibility of life for other [00:55:45] species. It creates diversity, it creates habitat that then all these other species can move into and live in. And, my question to us, to you, if you're listening, the question to sit with this week is that, [00:56:00] how can I be.

[00:56:02] **Chloe:** an ecosystem engineer in a way that brings positive benefit, to other species, literally to other species in nature.

[00:56:11] **Chloe:** And one very tangible recommendation is two options. One is that, is there anywhere at all that you have any kind of influence over that you could bring some water into? So could you create a little mini pond if you have a garden?

[00:56:27] **Chloe:** Could you, could you put in like a washing [00:56:30] up bowl and sink it in and put some water in it? And just even that is creating opportunities for like frogs, newts, all sorts to come and live there. Or even simpler than that. If you don't have, a place where you can [00:56:45] dig a hole and, and bring water, in, maybe you could pick up, some old sticks or find some dead wood somewhere and.

[00:56:54] **Chloe:** Leave that somewhere where you think it won't be disturbed, because so many [00:57:00] insects really depend on deadwood and dead matter, and they need it as part of their food source. They're the ones that do all the decomposing for us, and we're so quick to remove dead matter from our environment. So could you bring some in somewhere and [00:57:15] then go back with curiosity and see who's moved in?

[00:57:18] **Andy:** I love that. It's like a micro mission of rewilding.

[00:57:22] **Chloe:** Yeah.

[00:57:22] **Andy:** So have fun with [00:57:30] it.