



STRATEGIC PLAN

2012 – 2014

Preamble

The Canadian Environmental Grantmakers' Network (CEGN) celebrated its 10th anniversary in 2011. With just over a decade of growth and development under its belt, it has proved its value to its members and has continued to evolve as a dynamic player on the philanthropic stage in Canada. Its core functions for the past 10 years have included bringing members together; increasing our understanding of issues; and supporting effective grantmaking through skills development and capacity building. CEGN's main services have been the annual conference, monthly newsletters, and webinars. Its membership has grown to include an impressive diversity of funders, including private, community and corporate foundations, as well as corporate and government funding programs. The membership now also includes a number of private foundations which are based in the United States and provide funding for environmental work in Canada.

CEGN's last strategic plan (2009 – 2011) protected its much-treasured core services while making the bold move to focus on building bridges between the environment and other issues recognizing that today's problems require integrative thought and action. The first initiatives in this regard were two briefs on building bridges: one authored by Alex Wood (Senior Director of Policy and Markets with Sustainable Prosperity) and Tyler Hamilton (Editor of *Corporate Knights*) on the role for philanthropy in sparking the green economy; and the other brief to be released in 2012 co-authored by Bruce Lourie (President of the Ivey Foundation) and Rick Smith (Executive Director of Environmental Defence) on health and the environment. CEGN also held regional workshops structured around the green economy brief to discuss with members how best to engage new allies in environmental solutions and connect the dots between the sectoral silos in which we've been working. As well, CEGN established three collaborative funder groups focused on fresh water, energy, and environmental education. These have been positive steps for the organization.

So where are we now as we look at the next three years? There have been many encouraging gains and philanthropy has played a key role in a number of these. Environmental concerns have become more mainstream and many Canadian corporations 'walk the talk' with sustainability as a core value. The forest industry has been transformed with Forest Stewardship Certification and large swathes of the country are now protected as parks. However, the challenges posed by mounting carbon emissions and consequent climate impacts; deteriorating water quality and water quantity concerns in many jurisdictions; the poor health of our oceans; and a range of other environmental concerns still loom large as issues that need to be tackled.

Are we tackling them effectively? CEGN thoughtleaders and many others have raised concerns as to whether philanthropic dollars are being deployed as effectively as possible. The articles contained in our **Thoughtleader Series** featuring Andrew Heintzman, Frances Westley, Mark Sarner, Ann Dale, Michael Robinson, and Ian Gill address the topic of effective philanthropy in different ways but three common themes emerge: the need for i) greater collaboration among funders and with partners; ii) increased focus on public policy work; and iii) a more integrated approach to grantmaking that recognizes that complex problems require complex solutions and ensures that environmental issues are addressed with an eye to their social, economic, and cultural context.

Added to this, the recent targeting by the federal government of ‘radical’ environmentalists and ‘foreign’ funders has moved the need for a stronger collective voice to the front burner. Environmental concerns are once again being pitted against economic ones and a reframing and strong articulation of what we mean by environment is needed. Just as important as reframing is the need to achieve some congruency in the delivery of environmental messaging, as the delivery has often been fragmented, confusing, and/or overly technical.

The context in which CEGN is now working suggests that, once again, the organization is at an inflection point in its work. There is a clear consensus that the pace of environmental protection isn’t matching the scale of the environmental issues that confront Canada and the planet as a whole. So, as CEGN looks towards the next three years, it must continue to adapt, evolve, and embrace new ways of working.

CEGN’s Approach

To meet the task of crafting a new strategic plan, CEGN hosted a workshop on 27 October 2011 with members of the Board and a few invited guests, including past Board members. Board deliberations were informed by: a comprehensive member survey; interviews with selected members and some ENGO leaders; an in-depth internal scan; and a thorough progress evaluation of CEGN’s Strategic Plan 2009 – 2011.

Key Principles

With respect to CEGN’s mission moving forward, strong common threads emerged throughout the research, analysis, and discussions. The first was that CEGN must continue to provide value to its membership through its much-loved core services like the newsletter and annual conference. Second, that CEGN must go beyond these services and assume a more prominent leadership role. Based on the input provided by members, Directors, and external partners, there is strong consensus that CEGN should:

- **Demonstrate leadership** in all its activities
- **Create shared value** with like-minded partners and **increase the reach** of its work by looking outwards with an eye to working in partnership with other organizations
- **Build a big tent** by fostering an inclusive convening environment for a diversity of environmental grantmakers and a wide range of approaches to philanthropy
- **Experiment with new ways of working** to support learning, change, and capacity
- **Monitor progress** in ways that take into account a shifting landscape
- Develop a **highly effective network** of philanthropists dedicated to the achievement of our shared vision, focusing on the network's impact rather than its size

CEGN will endeavor to embed these principles in all of its work in addressing its mission rather than having these as stand-alone goals. In this way, leadership, inclusiveness, experimentation, value-creation, and getting results are not what we do but how we do it.

A New Vision

A significant outcome of the strategic planning process was the Board's desire to articulate a new vision for CEGN. CEGN has been guided by a mission "to expand the scope and effectiveness of grantmaking in support of the Canadian environment." But changing times call for a renewed sense of focus and purpose. CEGN's new vision – a first for the organization – moves the network beyond a sole emphasis on better and more effective environmental philanthropy and focuses squarely on an "environmentally sound and sustainable Canada." The new vision is rooted in the idea that a broad and integrated approach to achieve this goal is necessary and that environmental philanthropy needs to break out of the current paradigm which still views the environment as separate from other societal concerns. Building connections to economics, health, social justice, and other critical issues will be essential to the resolution of many environmental issues which confront us as a nation.

The Canadian Environmental Grantmakers' Network's vision is an environmentally sound and sustainable Canada.

A Renewed Mission

In order to realize CEGN's vision, the Board crafted a renewed mission for the organization, moving away from one focused solely on effective grantmaking to one emphasizing impact, collaboration, and strategic investments.

We work together to strengthen the impact of philanthropic support for an environmentally sound and sustainable future for Canadians.

Strategic Goals

If CEGN's vision and mission are its compass points for where it is headed as an organization, its strategic priorities provide the navigational markers for how to get there. The following 5 strategic goals will define CEGN's work over the course of 2012 – 2014, providing the strategic framework to help CEGN realize its vision and to equip the organization to successfully undertake its mission. Our priorities for the next three years are to:

- A. Give a Public Voice to our Shared Aspirations
- B. Facilitate Collaboration;
- C. Generate and Share Knowledge;
- D. Strengthen Skills; and
- E. Build a Strong Organizational Foundation

A. Give Voice to Our Shared Aspirations

The need for more effective communications by the grantmaking community, as well as by the broader environmental community, was flagged as a critical issue to be addressed throughout our strategic planning process. There was strong support for CEGN to help reframe the issues, speak louder on the public stage, add its voice to others with common values and objectives, and find creative avenues to get its message out. We believe that the key messages will focus on the development and dissemination of a broader understanding of “environmental funding” that reflects the full range of environmental grantmaking (urban as well as wilderness issues) and the integrated grantmaking approaches which embrace the intersection of environmental concerns with those of the economic, health, social and cultural sectors. We also believe that the implementation of the communications strategy will help achieve a better understanding of the contribution of the environmental community (funders and nonprofits alike) to environmental protection in Canada. We will:

1. *Develop a strategic communications plan* for CEGN which will articulate key messages; identify key audiences; locate the most effective communications channels; and take advantage of opportunities to give voice to CEGN and its members.

2. *Actively seek out opportunities to add our voice* to the national stage alongside key partners building on CEGN's submission to the House of Commons Standing Committee on Finance and collaborative communications work with Imagine Canada and others.
3. *Act as a conduit to amplify the voice of others* such as members, partners, and the NGO community where it advances the vision and mission of CEGN.
4. *Adopt leading edge communications technologies* which can best support the achievement of the network's vision.

B. Facilitate Collaboration

Facilitating collaboration remains a primary objective for CEGN and a key tool for increasing the impact of philanthropy. CEGN has instigated and facilitated collaboratives on issues including the boreal forest, energy, water, etc., as well as regional collaboratives that elevate the issues in a particular jurisdiction. CEGN will experiment and innovate in fostering the right conditions for funder collaboration whether the objective is shared learning, pooled funding, or formal strategic alliances, in order to enable members to leverage their assets and their influence. Over the next three years, CEGN will:

1. *Increase the effectiveness of funder collaboration* by undertaking work to determine: focal areas of highest need; best practices of other funder collaboratives; and best means to support/enhance communications and collaboration within the groups.
2. *Support the efforts of current funder collaboratives*: water; energy; and environmental education.
3. *Develop a framework and explore the opportunity for new funder collaboratives* based on best practices research, strategic priorities, and resource capacity.
4. *Increase regional programming* based on the success, and adapting the model, of Alberta funders which seeks "to explore peer-to-peer leadership and philanthropic investment in the future of Alberta's environment."

C. Generate and Share Knowledge

Generating and sharing knowledge is one of CEGN's core competencies. From painting a picture of the environmental funding landscape in Canada through the grants database to sourcing and circulating key research reports through the newsletter to publishing a Thoughtleaders Series on effective environmental philanthropy, CEGN has been the go-to place for members for the generation and sharing of knowledge. We know through our annual surveys that this core function continues to rank in the top three most valuable services CEGN offers. In order to understand the landscape in which we are working and maximize the collective knowledge within our member and partner organizations, CEGN will:

1. *Revise and update CEGN's environmental grants database* in order to increase our knowledge of where environmental grant dollars are being directed and to provide a better understanding of where philanthropic dollars are most needed.
2. *Provide a comparative look at the environmental funding priorities* of the funder and NGO communities and an in-depth comparative look at funding priorities within selected issues areas.
3. *Host an annual policy briefing* focused on environmental decision making at the federal, provincial and territorial levels to support and encourage the policy work of members and other partners.
4. *Undertake 'active intelligence' on Canadians' attitudes towards environmental issues* through polling and other research in order to better understand the cultural, social, and jurisdictional zeitgeist of Canada and its communities as it relates to sustainability.
5. *Collect and disseminate existing information* through the newsletter, the annual conference, webinars, and other fora.
6. *Develop an enhanced and more interactive website* in order to increase input and engagement from the membership into collective CEGN discussions.
7. *Create shared learning opportunities* through a webinar series on topics of common interest to the membership and other partner organizations where appropriate.

D. Strengthen Skills

A strong skill set is essential for all those seeking to effect change. CEGN will work to provide skill-building opportunities designed to help ensure that our members keep pace with a rapidly changing world. The focus here is on non-issue specific programming and, as a result, lends itself well to working in partnership with other organizations, including Philanthropic Foundations of Canada, Community Foundations of Canada, Imagine Canada, the Sustainability Network, The Circle on Philanthropy and Aboriginal Peoples, and others. Building skills that are needed to support CEGN's vision and mission and that are not already being well covered by other organizations will be a priority. CEGN will:

1. *Incorporate skills-building sessions* at the annual conference, and other fora where appropriate.
2. *Launch a skills-building webinar mini-series* based on the identification of those skills which are most needed by members and which will also advance our collective vision such as effective communications and/or strengthening public policy.

3. *Connect members to skills-building opportunities* provided by other organizations, such as Grantcraft and Grantmakers for Effective Organizations.

E. Build a Strong Organizational Foundation

CEGN is a lean organization that strives to work nimbly and efficiently. Yet to do so, while realizing an ambitious strategic plan, requires a solid organizational base, including in particular good governance and stable financing. There are many facets to tending to an organization's effectiveness and stability, but at this stage in CEGN's development, stable, predictable funding and strong senior leadership are the two priorities to ensure the organization's sustainability. We will:

1. *Develop an effective Member Engagement Strategy* focused on ensuring an excellent value proposition for members.
2. *Explore new business models* which will diversify revenue streams and develop new sources of income.
3. *Ensure the efficient use of funds* through the sharing or contracting of resources, e.g. securing technical help from partner organizations.
4. *Craft a strategic governance plan* for CEGN that will identify long-term governance goals, articulate a governance strategy including succession plan etc., and incorporate new components of governance.



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