Transform 2021
Bubble-Breaking and Sense-Making

Conference Sense-Making, Takeaways and More
Transform 2021:
Bubble-Breaking and Sense-Making

The global pandemic has given the world a glimpse of the challenges that lie ahead for our species in the face of climate change and ecosystem collapse. We have less than a decade to engineer a green recovery, safeguard ecosystem integrity and implement a pathway to net zero, centered in equity and social justice.

As funders, we must build on the progress the environmental movement has realized, while recognizing the need and the opportunity to act with even greater urgency. We must step up, do more, do it quickly and be willing to do things differently.

Transform 2021: Bubble-Breaking and Sense-Making, held over four days in late May and early June, 2021, delivered thought-provoking panel discussions, rich conversations, and clear calls to action. We are hoping it serves as a starting – and not an end – point.

This document is simply a reminder of the work we need to do together. It pulls together some of the thoughts, sense-making and ‘takeaways’ emerging from the conference - and houses them in one easy-to-access place.

With the conference over, it’s now our turn to work as a community to advance the solutions and transformation that we collectively explored during our time together. Our only option is to take bold action.
DAY 1 - REDEFINING ECONOMICS 101 - BREAKING THE ECONOMIC INERTIA BUBBLE
How do we engineer an improved economic system based on new, sustainable values so that it becomes feasible to prevent ecosystem collapse and firmly entrench a net zero pathway in this decade? With an important change of leadership south of the border and new industries and approaches coming to the forefront here, Canada has a unique window of opportunity to reverse our current trajectory and reinvent a new economy based on care and repair. We stand to gain immeasurably by rebuilding an economy where wealth and power are distributed equitably, resources are used sustainably, UNDRIP is upheld, and our social systems and infrastructure are guided by a deep, abiding commitment to social justice. In redesigning our systems based on such values, we can heal our relationship with each other, with other species and with the planet that contains and sustains us.

DAY 2 - ADVANCING DECOLONIZATION, EQUITY AND SOCIAL JUSTICE IN PHILANTHROPY - BREAKING THE PRIVILEGE BUBBLE
Recent events have illustrated the glaring disparities and discrimination that still exists across every aspect of society and have elevated the urgency to address Indigenous, racial, and other social justice issues. But how do we move from language and guiding principles to tangible action within the philanthropic sector? What are the implications of this new language and increased openness for change for environmental funders who are working to prevent ecosystem collapse and implement a pathway to net zero?

DAY 3 - WINNING HEARTS & MINDS TO ACCELERATE TRANSFORMATION - BREAKING THE PUBLIC OPINION BUBBLE
Research now shows that the majority of Canadians support climate action and place a high value on nature and protected spaces, but there remains a disconnect between people’s attitudes and support, and their willingness to take concrete action that requires behaviour change and collectivism. If we are to motivate action at the political level – and make sure that bold policies become entrenched as the norm regardless of shifts of the political pendulum – we need to fuel a sea of change in public opinion. How can we shift our resources and influence as funders to do so?

DAY 4 - TRANSFORMING OURSELVES - BREAKING THE PHILANTHROPIC BUBBLE
Our final day was an opportunity to explore how we can work together differently and more effectively to embody courage, embrace risk, share power, and act with urgency and humility to facilitate the transformation we desire. We were joined by members of Community Foundations of Canada for two concurrent sessions – funder collaboratives and community foundation and environmental work – and had open-space sessions, among ourselves, to address issues that emerge from our prior days' work.
The plenary and concurrent sessions at Transform 2021 featured conversations with close to 50 speakers with diverse perspectives and experiences. At the end of each session, EFC asked our session moderators to take a few minutes capture their thoughts on video.

Scroll to the next page to access these recorded moderator takeaways.
Session Moderator Takeaways

Day 1 - Economic Bubble
Toby Heaps, Corporate Knights
In conversation with:
- Carol Anne Hilton, Indigenomics Institute
- Rebekah Young, Scotiabank
- Hadrian Mertins-Kirkwood, Canadian Centre for Policy Alternatives

Moderator Takeaways

Day 2 - Privilege Bubble
Sherry Yano, Real Estate Foundation of BC
In conversation with:
- Emmay Mah, Toronto Environmental Alliance
- Wawa Gatheru, The Association for the Advancement of Sustainability in Higher Education
- Eriel Deranger, Indigenous Climate Action
- Graham Saul, Nature Canada

Moderator Takeaways

Day 3 - Public Opinion Bubble
Matt Price, For Our Kids
In conversation with:
- Aaron Myran, Future Majority
- Manvi Bhalla, Shake Up the Establishment
- Michael Bernstein, Clean Prosperity
- Hassan Yussuff, Canadian Labour Congress

Moderator Takeaways

Day 4 - Philanthropic Bubble
Joanna Kerr, MakeWay, in conversation with:
- Peter Kendall, Schad Foundation (Target One Funders)
- Julie Price, MakeWay (Northern Manitoba Food, Culture and Community Collaborative)
- Allie Urbanski, Community Foundation of Greater Buffalo (Great Lakes Funders Collaboration)

Moderator Takeaways

Alison Cretney, Energy Futures Lab
Seeking solutions from:
- Tyson Atleo, Nature United
- Lliam Hildebrand, Iron & Earth
- Lori Tagoona, MakeWay
- Laura Zizzo, Manifest Climate
- Toby Sanger, Canadians for Fair Taxation

Moderator Takeaways

Kris Archie, The Circle on Philanthropy and Aboriginal Peoples in Canada
Seeking solutions from:
- Lawrence Martin, Mushkegowuk Council
- Tom Liacas, Climate Justice Organizing Hub
- Nualo Charles, National Anti-Environmental Racism Coalition
- Yonis Hassan, Justice Fund
- Hannah Askew, Sierra Club of BC

Moderator Takeaways

Bernard Rudny, Strategy & Communications Consultant
Seeking solutions from:
- Jon McPhedran Waitzer, Resource Movement
- Natalie Odd, Alberta Environmental Network
- Jessie Sitnick, Argyle
- Malkeet Sandhu, David Suzuki Foundation
- Karen Ross, Farmers for Climate Solutions

Moderator Takeaways

Jason Bates, Calgary Foundation
In conversation with:
- Steve Winkelman, Ottawa Community Foundation
- Megan Tate, Winnipeg Community Foundation
- Suzanne Veenstra, Niagara Community Foundation

Moderator Takeaways
The last sessions of Days 1 - 3 provided an opportunity for conference attendees to explore and discuss deep questions that had arisen prior to or during the conference. Key themes and insights emerged from these sense-making sessions which will, we hope, fuel further discussion and action. These are captured on the slides that follow.

This is deep, personal work — the reason that change is slow is because it requires an inward focus on unlearning, overcoming our fears, reorienting our focus beyond our personal objectives to a higher collective goal, and being brave.
# Shifting from Charity to Justice - This Is 'The Work'

**Empower the Grassroots**
- Take risks and fund grassroots groups - social change, like civil rights, is led by community organizations working across movements.
- Diversify our grantee base - track diversity data, set targets and build in accountability mechanisms to reach them.
- Lobby CRA for broader options to support non-qualified donees.
- Ask larger grantees to be accountable for shifting resources to grassroots partners.

**Listen and Learn**
- Admit what we don’t know and outsource to community-based advisors and intermediaries who do know.
- Diversify leadership within our organizations... representation matters!
- Listen to and ‘be in’ community - build relationships!
- Pooled funding initiatives are an important tool (e.g., Indigenous Peoples Resilience Fund, Foundation for Black Communities.)

**Trust-Based Philanthropy is the Bare Minimum**
- Decolonize the application process - less focus on the written word and more on being in relationship and verbal reports.
- Relax grant timelines and be patient.
- Provide unrestricted funds for convening, capacity-building and strategic planning.
- Tailor application process to the size of the grant and capacity of the organization to report back.
- Provide unrestricted, multi-year funding (focus less on WHAT is funded and more on WHO is funded.)
- Coordinate with other funders to allow organizations to develop a single plan and report back in a streamlined manner.
- Develop simpler, more effective KPIs (the old ones are broken.)
- Move funding decision-making powers to community-led, participatory grantmaking structures.

**Shift Our Role**
- Use our privilege to create safe, nurturing spaces for Board learning and development (requires relationship-building skills, emotional intelligence, thoughtfulness and rigour.)
- Identify new players and voices that should be centered in our work and make space for them.
- Directly engage in government relations and advocacy.
- Facilitate storytelling as a way of instigating change.
- Convene multi-sectoral change initiatives.
- Practice operational transparency, honesty and openness.
- Provide capacity-building mentorship.
Impact Investment is Key to Impact

**COLLABORATE AND ADVOCATE**
- Avoid duplication and collaborate with others to co-invest in impact investments and share the cost of due diligence.
- Invest and engage in advocacy to encourage federal and provincial governments to remove economic barriers and create incentives for investments in impact areas.

**BUILD COMFORT WITH RISK**
- Socialize key concepts within our Boards and impact investment committees (e.g., question why we are more comfortable with traditional market risk where we stand to lose large sums of money, but scrutinize impact investment risks which often have much smaller monetary value.)
- Communicate that impact investments often outperform regular ESG investments (and when one fails, just call it a grant!)

**LEARN FROM AND SUPPORT BIPOC VENTURES**
- There is a lot we can learn from the Indigenous communities in this area - lots of capacity, leadership and projects we can learn from - and it can teach us about how to invest in other sectors. Some of the most sustainable impact investment projects are Indigenous-owned.
- Impact investments are excellent tools to support Indigenous economic development, BIPOC entrepreneurship and non-qualified donees.
- Many more opportunities to support these business ventures will emerge through angel investing.

"Socialize key concepts within our Boards and impact investment committees (e.g., question why we are more comfortable with traditional market risk where we stand to lose large sums of money, but scrutinize impact investment risks which often have much smaller monetary value.)"
We Must Break Down our Silos for Bold Change

ACTIVELY PARTICIPATE

- Funders must start becoming active participants in broader coalitions by investing time and energy, in addition to money.
- Start with ‘power maps’ to understand who has control over decision-making and who influences power to guide relationship-building across sectors.
- Philanthropy has an important convening role across sectors (community, government, industry, local entrepreneurs, philanthropy.)
- It’s never too late to start building important relationships (e.g., long years of relationship-building with unions are now paying off in just transition work, where change is now moving at the speed of trust.)
- Advocate for and support systemic changes to address “root cause” issues that ultimately advance our environmental objectives (e.g., more equitable tax system allows more public investment in environmental protection and strengthening democratic engagement and infrastructure allows for stronger environmental protections.)

DIVERSIFY OUR FUNDING STRATEGIES

- Invest philanthropic resources in constituency building to bringing new voices, alliances and systems of knowledge to the table – other voices beyond environmentalists are urgently needed so that progress becomes more resilient to political change.
- Fund local community work that is centered in public mobilization and community engagement, while placing the burden of emissions reductions and conservation targets on bigger players like industry and government.
- Find overlapping areas of interest and funding streams to engage other sectors (e.g., low carbon affordable housing.)
- Funder collaboratives are an excellent way to bring to break sectoral silos and advance bold change while reducing fundraising and reporting burdens on grantees.
- Place-based funding inherently works across silos.
Devika Shah, EFC's Executive Director, reflected on what she heard in each session and shared her key takeaways in an end-of-day newsletter to conference attendees. Here's a compilation of what resonated with her.
Breaking the Economic Interia Bubble

The Canadian economy has been built on one world view. Indigenous people have alternate generative economic systems, based on Indigenous world views that centre the interconnectedness of all systems, the wellbeing of future generations, our own humanity and dependence on nature. As we have seen during this pandemic, our dominant but broken economic system needs to be upgraded to better price the things that we actually value, and ‘Indigenomics’ can lead the way.

NGOs have a critical role to play in articulating and advocating for alternate visions that backcast from where we need to be, instead of forecast from where we are today. For example, the International Energy Agency has finally blown the whistle on the need to halt new fossil fuel development and that message has now been heard at Cabinet tables and boardrooms around the world, many years after environmentalists like Bill McKibben and others sounded the alarm.

There are a number of amazing environmental and economic solutions that are bubbling up everywhere, but they need to be rapidly scaled up to get us to where we need to be in a decade. The things that get in the way of pivoting to these new solutions with bold ambition are politics and weakened democratic systems, disproportionate concentration of wealth in the hands of a few, and our own fear of the unknown and cultural resistance to long-term thinking.

Philanthropy should be there when the business case isn’t immediately obvious to the powers that be. Philanthropy must be brave. By investing in the trusted messengers and leaders who are articulating and advocating for these alternate visions, and by supporting experimentation, community-building and organizing, philanthropy can play a critical role in shifting systems.
Breaking our Privilege Bubble

Devika’s Takeaways

Centering equity, social justice and a community development mindset in our environmental work makes it far more compelling, and the outcomes are much more durable when built with and through diverse communities.

BIPOC-led organizations in the environmental space already have intersectionality baked into their operations. They don’t need to overhaul their entire organizations to learn how to do this, because it is already a requirement for working within these communities. These are the groups that we need to equally value as the environmental ‘experts’, and fund, if we want to accelerate the pace of change.

The environmental movement must stop trying to mobilize others around our agenda and shift to a co-design model that requires building relationships, trust and reciprocity. It means we don’t have full control over the process or the outcomes. We have to go slow to go fast, if we want to build a movement that leads to durable systems change by withstanding swings of the political pendulum.

Inspired chats are wonderful, but we need to sit with and reflect on our discomfort as funders, when faced with the implications of translating this inspiration into action. We need to openly and honestly explore as a community why we are so quick to nod our heads when we discuss issues of equity and privilege, but so slow to take action.
Devika’s Takeaways

Breaking the Public Opinion Bubble

Policy lives downstream from politics and politics lives downstream from culture. A key role for philanthropy must be focused on shifting cultural values, and this is not the outcome of a single campaign but a diversity of efforts over a long period of time.

We must thoughtfully consider where audiences consume content and who they trust to deliver that content. Cultural shift does not happen through earned media. We need to invest in the multi-year, difficult-to-measure, hard work of grassroots relationship-building through partnerships, coalitions, and community engagement efforts. It means supporting and listening to the people at the front lines of community organizing, direct action and public mobilization.

When we organize around a single issue, we compromise our ability to connect to people’s core values. Instead, we need to ‘go where they are’. Rather than trying to get others to care about our goals, we need to recognize that any movement that is centering public benefit and social justice will inevitably advance environmental solutions in ways that lead to cultural shifts. Then, we must LISTEN to what others care about, understand the interconnections between their issues and ours, and change the way we communicate and campaign.

Structures in philanthropy can have unintended consequences that hamper our ability to instigate culture shifts, and there is much that can be done to address those structures. This includes changing the outputs that we value and report on, finding ways to support non-qualified donees, employing participatory grantmaking models driven by grassroots experts and proactively seeking out people doing novel grassroots engagement work rather than making them find us.
At the start of each session, we asked our speakers to introduce themselves by recommending one book they felt was a 'must-read'. Their suggestions spanned all genres of non-fiction and fiction and will keep you happily reading for months (or years) to come.

**ACCESS THE BOOK LIST**

Transform 2021 kicked off with award-winning rap artist, Baba Brinkman, freestyle rapping about animals, environment, philanthropy and anything else we threw at him in the chat! We were all amazed (and exhausted) watching him. Baba generously put together a compilation of the raps he performed for us at the event. Enjoy!

**CHECK OUT THE EFC RAP!**
Some Final Thank-yous

To the Conference Planning Committee

James Littley (Chair), The Okanagan Basin Water Board
Kris Archie, The Circle on Philanthropy and Aboriginal Peoples in Canada
Jennifer Canham, The Weston Family Foundation
Devin Causley, Federation of Canadian Municipalities
Margaret Herriman, Max Bell Foundation
Joanna Kerr, MakeWay
Scott Lloy, Government of New Brunswick, Department of Environment and Local Government
Elizabeth McCallion, Peter Gilgan Foundation
Caroline North, North Family Foundation
Hedy Rubin, Real Estate Foundation of BC

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...and to all who attended for helping to break our bubbles and make sense together!