



# CEGN's Strategic Plan for 2017-2019



**Canadian Environmental Grantmakers' Network (CEGN)**

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## Introductory Statement

The Canadian Environmental Grantmakers' Network (CEGN) was incorporated in 2001, following the pioneering work of a number of private foundations who saw the synergies to be achieved from bringing environmental funders together to share perspectives and brainstorm challenges. From that start of nine funders, CEGN has now grown to represent 64 funders from not only private foundations, but also from community foundations, as well as corporate and government environmental giving programs.

In the more than 15 years since the network's establishment, the shape and style of philanthropy in Canada and beyond has evolved considerably. Increased collaboration; more sophisticated evaluation tools; a growing emphasis on transparency; and a clear desire to look beyond the grantmaking role of funders are just some of the changes that we have witnessed across the sector.

The work of CEGN and its members has been a key part of this evolution and has been identified in particular with some of the following changes:

- **Expanded Scope:** In the early years of the network, the majority of grantmaking by CEGN members was focused on the protection of species and spaces. While that continues to be an important focus for many funders, the issues of sustainable cities; fresh water; energy and climate; and food security have emerged as important policy and engagement areas for many of our members.
- **Systems Approach:** Complex sustainability issues which are rooted in the health of the environment but also include economic, social and cultural dimensions lie at the heart of much of the work with which our members are now engaged. A siloed approach to issues is no longer working and funders and others are exploring systemic approaches which involve a range of players and tactics, as well as much deeper time commitments. New skills to navigate these waters successfully, including partnership brokering and systems mapping are in demand.
- **Investing for Impact:** A number of funders are realizing that the traditional suite of philanthropic tools is no longer adequate to the societal challenges they are trying to address. The growing emphasis on a social finance perspective and engagement in a spectrum from grantmaking through to mission-aligned investing is taking hold within the Boards of many of our members. Other funders are opting for direct program engagement to achieve their goals, as well as or instead of grantmaking. Still others are beginning to support different kinds of grantees beyond the traditional NGO community. For example, innovative work with the financial sector by one of our members is bringing new allies to the goal of achieving a more sustainable future. Other funders, as well as the broader charitable sector, are focusing on the reform of charities regulations to allow for new kinds of investments, as well as clarifying regulations to ensure a strong public policy role for charities.
- **Indigenous Partners and Reconciliation:** Many of our members are now working with Indigenous organizations and communities and others are eager to do so. CEGN and many individual foundations are signatories to The Philanthropic Community's Declaration of Action which was presented at the closing hearings of the Truth and Reconciliation Commission in June of 2015. However, the role for philanthropy in the

broader process of reconciliation is still very much in discussion. With recent court decisions confirming the role that Canada's Indigenous peoples play in decisions affecting the use of much of our country's land base and resources, there is clearly a close alignment between Indigenous concerns and the work of a number of environmental funders.

- **Global Tools and Targets:** The boundaries between domestic and international issues have become increasingly blurred.
  - The Paris Climate Agreement signed by 175 countries in December of 2015, places the carbon reduction work of Canadian governments, civil society organizations and corporations firmly within a global context. The opportunities to look beyond our borders for partnerships and learning and leveraging opportunities to tackle climate change abound.
  - The United Nations Sustainable Development Goals also afford another opportunity to position philanthropic work here at home within an ambitious global framework. The 17 goals to be achieved by 2030 – including sustainable cities; clean water; climate action; responsible consumption; and clean energy - are intended to apply across all countries, not just the global south. These goals are central to the broader 2030 Agenda for Sustainable Development, adopted by the UN in 2015. The Strategic Plan for Biodiversity and the Aichi Biodiversity Targets are another example of an international tool relevant to work here in Canada.
  - The United Nations Principles for Responsible Investment are being adopted as a benchmark by many investors around the world, including by some Canadian funders who want to demonstrate a public commitment to responsible investing.
  - The United Nations Declaration on the Rights of Indigenous Peoples, regarded as an important standard for the treatment of Indigenous peoples around the world, resonates deeply with Indigenous peoples in Canada and is seen by some communities as a starting point for many discussions around philanthropic engagement.

Bringing these global tools and targets into our thinking as to how philanthropy can help advance a sustainable future for Canada seems opportune and useful.

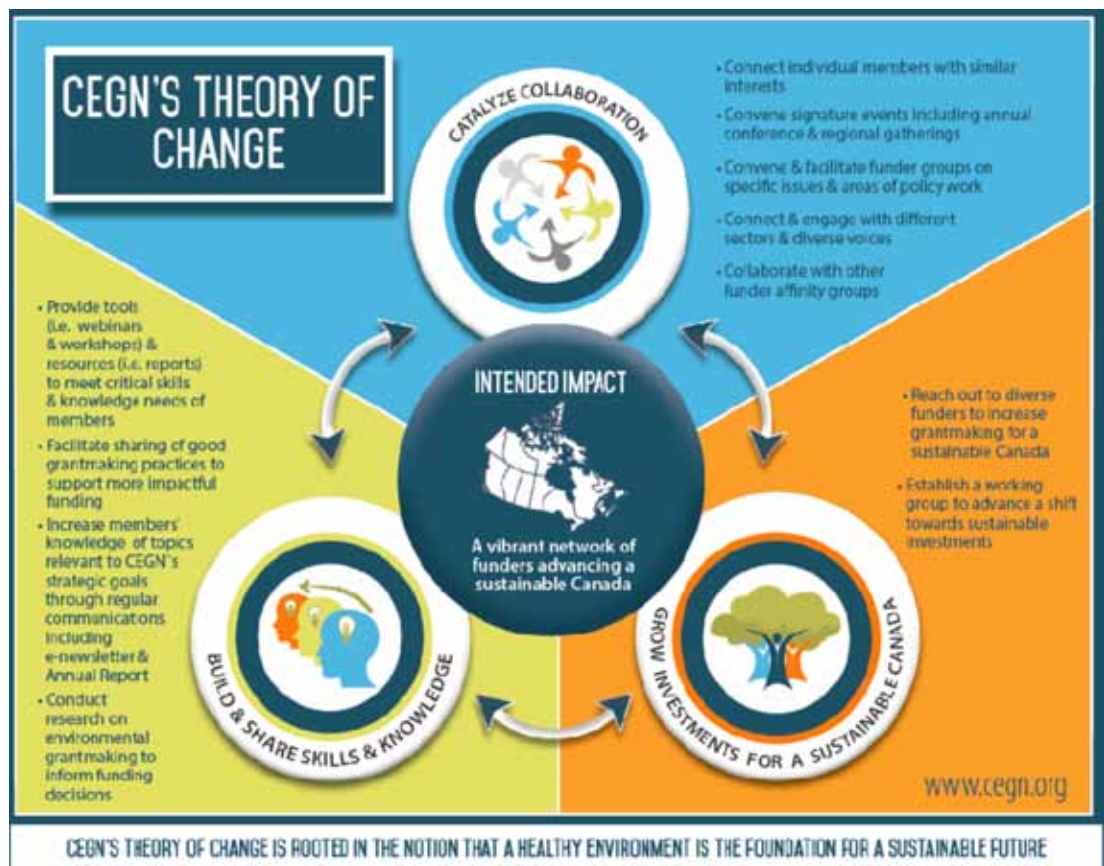
## Moving Forward:

Against this backdrop of change and ongoing evolution in the work of environmental funders and the context for that work, CEGN embarked on a strategic clarity process in 2015 with the support of Innoweave. A core group of Board and staff worked with our Innoweave coach, Lynn Fergusson over an 8-month period and then brought the draft Theory of Change to the full CEGN Board for further discussion. In the spring of 2016, the Board approved a Theory of Change with CEGN's Intended Impact articulated as a "A Vibrant Network of Funders Advancing a Sustainable Canada" with our Ultimate Impact being "A Sustainable Canada, Valuing People, Planet and Place". Our Theory of Change is rooted in the notion that a healthy environment is the foundation for a sustainable future and articulates three core strategies, as follows:



- Catalyze Collaboration
- Build and Share Skills and Knowledge
- Grow Investments for a Sustainable Future

While the first two strategies have been core to CEGN's work since the beginning, the current strategic plan calls for these activities to be carried out with greater intentionality and strong alignment to the goal of advancing a sustainable Canada. The third strategy "grow investments for a sustainable Canada" is a new one, reflecting the desire to encourage funders to use the full array of financial mechanisms in support of sustainability. Another salient factor in the strategic plan is a move towards an emphasis on sustainability philanthropy, rather than environmental philanthropy. This recognizes the interconnected nature of environmental, social, and economic issues and the fact that in many cases the resolution of environmental concerns requires an integrated approach that also addresses social and economic needs.



## Strategic Goals: Implementation and Outcomes

### Catalyze Collaboration

CEGN will catalyze collaboration in the following ways:

i) Member to Member collaboration will be prioritized and we will foster this by:

- Connecting individual members with common interests
- Developing effective funder collaborations with clear and measurable objectives, including the establishment of annual plans and budgets; strong governance and adequate staff or consultant support
- Convening signature events, including the annual conference and two regional gatherings per year

ii) Outreach to specific sectors to explore where organizational missions are aligned and the potential for working together is a new dimension of work for CEGN.

We will do this by connecting and engaging with networks and associations in the following sectors:

- Indigenous organizations and communities – with a view to helping bridge environmental philanthropy with Indigenous communities and organizations
- Municipalities – with a view to identifying and acting on opportunities to connect environmental philanthropy with sustainable cities initiatives of municipalities
- Other levels of government in Canada – with a view to better understanding their impact on sustainability initiatives relevant to the work of CEGN and our members and to developing stronger relationships
- Universities – with a view to better understanding their role in advancing a sustainable future for Canada and identifying relevant opportunities for our members and the network as a whole to connect and collaborate
- Corporate Sustainability Organizations – with a view to identifying and acting on the best opportunities for connecting philanthropy with corporate sustainability initiatives

iii) Collaborating with other funder and or non-profit affinity groups, in particular Philanthropic Foundations of Canada; The Circle on Philanthropy and Aboriginal Peoples; Community Foundations of Canada; Imagine Canada and the Sustainability Network.

We will do this by identifying and acting on opportunities which can increase impact and rationalize resource outlays. In some instances, CEGN may be able to offer a leadership role. In others, we can be a willing and active partner, bringing the network's perspective to the issue at hand.

iv) Assessing the applicability of Global tools and targets to funder collaboration and, where appropriate, reflecting these in our work.





### **Short-term Outcomes (1 – 3 years):**

- Members have strengthened relationships and developed partnerships
- Funder groups have formed and group members are working towards shared goals
- Cross-sectoral conversations and initiatives have been catalyzed and a more diverse network of funders is emerging
- Understanding of relevant work by Indigenous communities and organizations; governments; universities and businesses has increased and strong collaborative initiatives are emerging

### **Long Term Outcomes (3 – 5 years):**

- More leveraging opportunities have emerged
- There is more collaboration among funders and with other sectors
- Grantmaking efforts are more co-ordinated and effective
- Systemic solutions involving diverse actors have emerged

## **Build and Share Skills and Knowledge**

CEGN will build and share skills and knowledge through:

- Providing tools and resources to meet critical skills and knowledge needs of members, especially those which are relevant to a member's role in advancing a sustainable future for Canada. Topics will include: a systems approach to grantmaking; partnership brokering; and evaluation and measurement. In addition, the Global Sustainable Development Goals and the Biodiversity Indicators will be explored as tools by which funders might focus their funding and assess their progress. Tools and resources designed to advance CEGN's other strategic goals – catalyzing collaboration and growing investments for a sustainable Canada – will also be developed.
- Facilitating sharing of good grantmaking practices to support more impactful funding through highlighting members' work on our website, newsletter and through convenings
- Increasing members' knowledge of topics relevant to CEGN's strategic goals, as well as key environmental issues, through regular communications
- Continuing to conduct research on environmental grantmaking to inform funding decisions

### **Short-Term Outcomes (1 – 3 years):**

- Members have a better understanding of tools and resources to advance their work and are applying skills and new knowledge
- Funders have learned from other funders
- Members have been contacted on a regular basis and have received information that assists them in their work
- Regular grant database updates have been prepared



### **Long-Term Outcomes (3 – 5 years):**

- We have stronger and more effective philanthropic leaders and grantmaking is more effective, especially with respect to the goal of advancing a more sustainable future for Canada
- Greater efficiencies have been achieved as funders are not reinventing the wheel
- Funders are well informed and more effective as a result

### **Grow Investments for a Sustainable Canada**

CEGN will grow investments for a sustainable Canada by:

- Reaching out to diverse funders to increase grantmaking for a sustainable Canada. This work will include: the development of a tool kit by which all grantmakers can apply a sustainability lens to increase the sustainable impact of their philanthropy; outreach to potential funders with a clear message as to how their philanthropy can support a more sustainable future for Canada; dedicated outreach to wealth advisors to make them aware of the opportunities by which their clients can support sustainability initiatives; and increasing awareness of the extent to which granting and the investment of a foundation's endowment can be aligned to help advance the sustainability of the country (and beyond).
- Establishing a working group to advance a shift towards sustainable investments. An initial step will be a landscape assessment to identify where funders are at in terms of embracing mission-related investing and the obstacles that they may be encountering.

### **Short-Term Outcomes (1 – 3 years):**

Grant funding for sustainability has increased.

- Endowment investments have begun to shift to support a sustainable future

### **Long-term Outcomes (3 – 5 years):**


- Sustainability grantmaking has become a substantial philanthropic focus in Canada
- CEGN members with endowments have adopted a focus on mission-related investing using a range of strategies and tools from impact investing to the use of ESG criteria

### **Increase CEGN's Internal Capacity**

This strategy is an internal one and not reflected in the Theory of Change. However, it serves as a foundation for the achievement of the other three strategies and its implementation is clearly instrumental for the achievement of our intended impact. The strategy focuses on ensuring strong governance and effective operational management of CEGN, as well as providing a compelling case for members to engage with the network.







CEGN will increase internal capacity through:

- Ensuring sufficient financial resources so that CEGN is able to be an efficient and effective organization. Membership retention and recruitment are priorities, as is a focus on ensuring program and event revenue to support the work of the other strategies.
- Ensuring strong governance procedures are in place, including effective internal policies and the maintenance of a strong Board of Directors
- Establishing Board Committees to oversee the work of the Strategic Plan; acting on opportunities to connect and rationalize work across strategies; and developing a process to evaluate the effectiveness of the strategic plan
- Ensuring the effective recruitment and management of staff for the network
- Positioning CEGN as a welcoming network for all funders interested in advancing a sustainable Canada. This will include: reviewing CEGN's brand identity to ensure that our brand is aligned with our intended impact; striving to reflect the geographic diversity of Canada, as well as the diversity of the funding community, in our membership; and ensuring that funders feel connected and see value in their membership in the network.

**Short-term Outcomes (1 – 3 years):**

- CEGN Board and staff are using the Imagine Canada Standards for Canada's Charities and Nonprofits as a benchmark for our work with an annual review of the organization's alignment with the standards
- CEGN has a diversified funding base and sufficient resources to implement its strategic plan, with an effective fundraising strategy underpinning the 2017-2019 strategic plan
- Membership in CEGN is valued by funders who are seeking to advance a sustainable future for Canada
- CEGN is able to successfully recruit and retain effective staff and Board members
- Membership in CEGN has grown and diversified in terms of both the geographic location and type of funders within the network

**Long-term Outcomes (3 – 5 years):**

- CEGN and its members are critical players in work to achieve a sustainable future for Canada and are working in tandem with a range of partners who share this goal