
**November 14, 2006 *Thought
Leader Forum* on Environmental
NGO-Industry Collaboration:**

Post-forum proceedings summary

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*November 14, 2006 Thought Leader Forum on Environmental NGO-Industry Collaboration:
Post-forum proceedings summary*
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About the Pembina Institute

The Pembina Institute creates sustainable energy solutions through research, education, consulting and advocacy. It promotes environmental, social and economic sustainability in the public interest by developing practical solutions for communities, individuals, governments and businesses. The Pembina Institute provides policy research leadership and education on climate change, energy issues, green economics, energy efficiency and conservation, renewable energy and environmental governance. More information about the Pembina Institute is available at <http://www.pembina.org> or by contacting info@pembina.org

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November 14, 2006 *Thought Leader Forum* on Environmental NGO-Industry Collaboration:

Post-forum summary and recommendations

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Executive Summary

Rising interest in collaboration between industry and environmental non-government organizations (ENGOS) led to the development of a “Thought Leader Forum” on the topic. In November 2006 Pembina invited 30 representatives of industry to join 25 Canadian environmental NGO representatives, Pembina staff and facilitators for a discussion of effective corporate-ENGO relationships. (For a full list of attendees, please see Appendix 3.1.)

The open and honest dialogue of the forum allowed ENGO and Industry representatives to discuss their experiences – both positive and negative – with collaboration, identify the underlying conditions to make collaboration successful, and offer new ideas for ENGO-industry collaboration that adhere to these essential conditions.

The Case for Collaboration

The first question posed to participants was the necessity of collaboration between industry and ENGOS. Participants broadly recognized the business case for collaboration, such as

- the “collaborative advantage” that arises from the reduced decision making costs, the potential for increased market share, better customer retention and better employee attraction and retention that result
- it promotes transparency, thereby enhancing credibility, license to operate and brand value.
- one working table went as far as to say that ENGOS and industry are “unlikely [to] ‘survive’ without forms of collaboration.”

Finally, several risks associated with collaboration were also discussed.

The Best and Worst of ENGO-industry Behaviour

During their discussion of past experiences, participants had a positive discussion around which types of behaviour were best for enhancing collaboration:

- Many groups pointed to early engagement as a key to building long-lasting relationships between ENGOS and industry.
- ENGOS can help industry through demonstrating an understanding of the business world, being solutions-oriented even keeping a ‘hot line’ for communications with industry always open. They harm relationships with industry by having hidden agendas, prejudging their industry counterparts or failing to deliver on commitments.
- Industry can help ENGOS by making adequate resource investments to ensure successful collaboration and “trying to understand life as an ENGO.” They harm relationships through having corporate messaging that’s inconsistent with corporate action, “playing the denial game,” sending an inappropriate person to be part of the collaborative initiative.

Underlying Conditions for Successful Collaboration

Drawing from the results of best and worst behaviors of ENGOs and industry, participants came up with four primary conditions for successful collaboration:

- It is important to include the right people that have a clear understanding of their role in collaborative efforts to ensure a successful project.
- Both sides must move beyond chat to commit to actively pursue solutions.
- The necessary time, resources and support structure are in place for both sides
- Lastly, the participants required common ground and clear wins and risks at stake for both sides to establish a successful relationship.

How to Keep the Conversation Going

There was an incredible response from participants that the dialogue started at the forum needs to continue. Their imperatives for “keeping the conversation going” are:

- We must work together to find the appropriate participants to pursue these initiatives.
- There must be networking opportunities to get different groups interested and involved.
- Education is critical to creating mutual understanding and building capacity.
- Reliable funding must be secured to ensure collaboration efforts last.
- Government must be consistently approached from all parties to improve policy and reiterate the importance of this initiative.

Next Steps

The Pembina Institute has committed to keeping the dialogue going. Specifically, it will develop a plan of action for achieving the two categories of recommendations emerging from the forum: **developing informal and formal networking and dialogue opportunities**, and **developing models and tools for collaboration**.

As noted in the “imperatives” section, reliable funding must be secured to ensure collaboration efforts last. To help it develop the plan, and to jump-start the fund development process, Pembina will seek the advice and support of forum participants during early 2007. From there Pembina will circulate the plan to ENGOs, governments, companies and foundations not present at the forum, but interested in the topic.

Introduction

Effective stakeholder engagement is fundamentally important to successful corporate strategy development and implementation. This is especially true for resource sector companies. As a practice, stakeholder engagement, especially among environmental non-government organizations (ENGOS), has shifted from “management” to “collaboration.” In this way, the intent of the corporate-ENGO relationship is to create social capital – a key ingredient for business value creation, community development, and environmental protection.

On the afternoon of Tuesday November 14, 2006, the Pembina Institute convened a “Thought Leader Forum” on the topic of ENGO-industry collaboration in Kananaskis Country, Alberta. Pembina invited 30 representatives of industry – spanning energy, manufacturing, tourism and consulting – to join 25 Canadian environmental NGO representatives, Pembina staff and facilitators for a discussion of effective corporate-ENGO relationships. (For a full list of attendees, please see Appendix 3.1.)

Over the course of the afternoon, participants discussed such topics as:

- their experiences with ENGO-industry engagement, including bilateral and multilateral;
- the underlying conditions for successful collaboration;
- pitfalls and traps to avoid; and
- new ideas for ENGO-industry collaboration.

The following attempts to capture the key proceedings that came out of the afternoon’s discussions, and build on discussions where useful. It was prepared by summarizing and grouping into themes flipchart notes taken during the forum at each of the eight tables, conducting select post-forum participant surveys, and reprinting descriptions of model initiatives (as presented in Appendix 3.3). Section one of the report summarizes group comments per question posed by forum facilitator Monica Pohlmann. Section two outlines participants’ imperatives for “keeping the conversation going” vis-à-vis positive ENGO-industry collaboration.

1.0 Setting the Context: group reflections on collaboration

1.1 Why do we care about collaboration between industry and ENGOs?

Participants broadly recognized the business case for collaboration. They discussed at length the “collaborative advantage” that arises from the reduced decision making costs, the potential for increased market share, better customer retention and better employee attraction and retention that result, to name but a few components. One working table went as far as to say that ENGOs and industry are “unlikely [to] ‘survive’ without forms of collaboration.” Generally, their comments in support of collaboration can be grouped into the following themes:

Our goals are actually very similar

TLF participants recognized the common needs we share as human beings (clean air, clean water etc.) regardless of whether we work for industry, government or an ENGO. Working together not only highlights this commonality, but also brings goals closer together. Participants also noted that early engagement between ENGOs and industry could help to both create “clearer understanding of the common ground” and identify the “legitimate differences” in goals.

Industry and ENGOs can be useful role models and information resources for each other

TLF attendees acknowledged the resources that both ENGOs and businesses bring with them. Businesses have greater money and other capital resources that allow them to “move quickly.” The allocation of resources offers a lesson to ENGOs on “how to get things to market” in addition to the money and capital resources themselves. For their part, ENGOs can provide “ideas to move beyond compliance and/or become compliant,” and raise “issues that would otherwise remain unidentified,” thereby decreasing corporate liability risk. Further, ENGOs can help companies to clarify priorities and issues with regards to sustainability.

Collaboration increases the efficiency of both sides

Groups were quick to recognize that there is “strength in numbers” when business and ENGOs collaborate. As long as both parties are solution-oriented they are able to help one another increase efficiencies. An example given was that collaboration improves the decision-making abilities of business. Since change is generally identified as a risk for businesses, decisions are very deliberate and ENGOs can become impatient. The valuable ENGO perspective enables

business to more efficiently make decisions. Similarly, ENGOs are empowered as there is more buy-in to the solutions they are suggesting “inside the tower” of business. A noted benefit was the positive response an ENGO may receive when recommending innovative best practices for industry to undertake.

Collaboration promotes transparency, thereby enhancing credibility, license to operate and brand value

TLF participants recognized that collaboration and transparency go hand in hand. When a business includes an ENGO partner in their decision-making processes they are effectively opening up their operations to public scrutiny. Since ENGOs generally have a high awareness of public opinion they are a helpful “warning system” for industry. Many comments were made that businesses would be favorably recognized for their collaboration efforts with ENGOs and that public relations would improve as a result. Furthermore, once a business is viewed as ‘open’ to collaboration it is more likely to be approached by a variety of organizations for future collaborative projects.

Collaboration reduces the chance of costly disagreement

The participants acknowledged that there are limits to an adversarial approach between business and ENGOs. If collaboration is pursued as a step in the decision-making process, industry can avoid costly and undesirable arbitration by ENGOs. Working together to understand the issues from both sides is a pro-active approach to balance interests. Collaboration enables mutual understanding between groups, which can result in new directions that were never considered prior to engagement.

There can be political wins associated with collaboration

Many participants were quick to point out a lack of government leadership on environmental issues. Collaborative efforts were identified as a means to overcome political cautiousness. A productive business/ENGO relationship “provides legitimacy to [the] government” that working together is possible and may ultimately lead to policy change. It was agreed that collaborations between groups with divergent views could grab the attention of government and increase awareness of a particular issue.

It's in our nature to collaborate

A frequent comment we received after the end of the workshop was that participants appreciated the opportunity to start new relationships and make new friends across sectors. Working in a collaborative environment is a chance to humanize issues and reach a consensus across groups with sometimes divergent opinions. As one group stated, a “positive approach can be exciting,” as opposed to the aggressive attacks and defensive responses that frequent ENGO/industry dialogue. By “demonstrat[ing] some vulnerability” there is an opportunity for both sides to understand how their actions are perceived and improve on them.

1.2 What are the risks associated with collaboration?

Although it was not a specific question posed in the workshop, participants consistently discussed that there are inherent risks associated with collaboration. There are risks that hinder both industry and ENGOs from working together and must be evaluated prior to any commitment to collaborative activities.

For Industry

TLF participants remarked that business can become a “target for more scrutiny” when partnering with an ENGO. Once a business attempts to improve their environmental performance they could be criticized for doing too little. Industry relies heavily on their credibility and reputation to maintain profitability. If a company, or an individual within, is accused to doing too little or “not being able to walk the talk” their reputation will be tarnished and they could easily lose clients. Moreover, it was noted that businesses have a higher financial risk when collaborating. Industry typically makes larger capital investments in time and resources than would habitually budget-constrained ENGOs.

For ENGOs

ENGOs also hold their reputation very dearly, and are aware of the risk of appearing to compromise their values through collaboration with the for-profit sector. For example, collaboration with the ‘wrong’ organization (i.e. one that has a negative reputation within the ENGO community) can have detrimental effects on an ENGO’s credibility. Equally important is the risk of draining staff time, energy, and expertise through pursuing collaboration that in the end does not live up to expectations or objectives.

For both

Participants recognized that there are common risks for both ENGOs and industry that must be addressed before collaborating. As mentioned prior, reputation is an issue that influences decisions across every sector and type of organization. The risk of failure or not delivering on expectations is at the core of collaborative risk. It was also mentioned that external factors, such as political or economic changes, could affect promises made in collaborations.

1.3 What are the best things that ENGOs and industry can do for one another?

Participants had a positive discussion around which types of behavior were best for enhancing collaboration. Many groups pointed to early engagement as a key to building long-lasting relationships between ENGOs and industry. During encounters early in a relationship, it is important to be frank and honest and to not pre-judge your partner. Business training was mentioned as extremely beneficial for an ENGO, as well as focusing on a specific outcome of the collaboration to not lose sight of the initial goal. Overall, mutual understanding seemed to be mentioned most often.

ENGOS

Initiate dialogue and collaboration early, before a fire arises

Working together early in a process or decision in a proactive way is much more enjoyable than defending your decision from attack. Participants identified the need for industry to understand who ENGOS are and what they can offer. This would involve initiating contact and dialogue with each other early in the process in order to build long-term relationships instead of rushing in to solve emergencies. Participants believed that early collaboration would result in a “better project in the end” as well as “better mutual understanding.”

Be open minded and forthright when approaching industry to collaborate

Trust between ENGOS and industry is a crucial element that must be earned to facilitate collaboration. TLF attendees recognized hidden agendas as a deal breaker for any relationship between organizations. ENGOS committed to finding the truth must pursue collaboration with an open mind and be willing to listen to the industry perspective. Another factor mentioned by groups was the importance of information sharing between parties.

Demonstrate an understanding of the business world

TLF participants agreed that technical business training was an incredible asset to have when working with industry. Beyond just academic business training, groups identified the need for understanding the business perspective and why companies behave the way they do. Decision-making delays were discussed as well as the importance of stakeholders in those decisions.

Be solutions-oriented

Participants agreed that ENGOS need to “stick to the facts” and “avoid fear tactics” when working with industry. Establishing proactive relationships where solutions are offered is critical to the momentum of collaborative relationships. Another issue discussed by participants was the use of “hot words,” such as “moratorium,” which could bring progress to an immediate halt.

Treat industry as you would like to be treated yourself

Mutual respect is the bedrock of any functional relationship. Participants viewed ENGO/industry partnerships as a great way to “bring collective power to the table.” However an important aspect of these collaborations is recognition of the values and expectations both parties bring to the relationship. One suggestion was to have a sort of advance warning ‘hot line’ for ENGOS to communicate with industry on urgent issues such as lawsuits, op-eds or critical study releases, so that businesses can brace themselves for the impact. In keeping a positive relationship it was also suggested that ENGOS “give recognition when progress is made” to encourage business and avoid unconstructive criticism.

Industry

Try to understand life as an ENGO

One of the many benefits gained through collaboration is mutual understanding. TLF attendees were adamant that industry recognizes the ENGO perspective. Top characteristics mentioned were that not all ENGOs are the same, resources are finite, many decisions are value-based, ENGOs also have stakeholders, and lastly that for ENGOs “not all areas are open for business.” Businesses need to appreciate the difficulty an ENGO has in collaborating when usually they must have an ‘in’ to even initiate a dialogue.

Make available the resources necessary for successful collaboration

TLF participants identified that industry has the ability to provide ENGOs with adequate time, resources and capacity when collaborating. Industry has the ability to teach ENGOs about the technical nature of business and offer advice on finance issues or investor strategy. Accessibility and information sharing were also proposed as important requirements that needed to be fulfilled by industry. More specifically, participants desired “access to people that actually influence the decisions.” It was agreed that actively seeking and giving feedback on how input was considered (or not) was a positive relationship builder.

Offer an appealing environment to ENGOs

Industry can attract ENGOs to collaborate if they create a comfortable setting in which to work together. A first step that was offered by participants was for companies to create a website and/or pamphlet that describes why ENGOs are welcome to work with them. Once a relationship begins it is important to be open-minded about suggestions given by ENGOs and to give ideas merit, as this is routine in an ENGO workplace. ENGOs also live in a world where they consistently take risks to achieve their mission. Industry should offer to accept some level of risk upfront and be open to compromise in the future.

Initiate dialogue and collaboration early, before a fire arises

TLF participants were clear that they would enjoy building long-term relationships with industry instead of being called in for small projects or to “fight fires.” ENGOs appreciate being consulted before a decision is made, rather than notified of the outcome. Another role ENGOs can play is as an independent, third party reviewer of corporate reporting. This role allows ENGOs to be direct with business about what needs changing, but also reinforce what they are doing right.

1.4 What are the worst things that ENGOs and industry can do to one another?

Participants in the workshop were tasked with establishing a list of the ‘worst practices’ of ENGO and industry when collaborating. Maintaining trust and honesty between collaborating

partners appeared to be very critical to participants, as this theme is the core of several of the following sections. Prejudgments and failure to follow through on commitments were other highlighted examples of bad behavior. The following sections list behaviors that should be avoided by ENGOs and industry.

ENGOs

Have hidden agendas and deceptive behavior

Participants identified a worse case scenario of “ENGO campaigns based on misusing inside information on corporate operations gained through collaboration.” This sort of deceptive action will burn any bridges ENGOs have built with industry and diminish the possibility of future collaborations across the entire ENGO sector. Also noted was the importance of being transparent about relationships and performance to external sources such as the media. Collaborations will only be successful if all parties involved are upfront and committed to finding a mutually beneficial solution.

Prejudge industry

The ENGO perspective can many times lead to pre-judgment of industry. One participant went as far as saying ENGOs assume an “inherent flaw” or that a company is “evil” on first glance. It is detrimental to progress when organizations are polarized and looked at as either good or bad. Prejudgments often lead to a refusal to engage when it could be beneficial to both parties. If a company is viewed as too controversial to engage with, all responsibility to improve their performance falls on the government regulatory process, which was agreed to be a less effective route. When ENGOs enter a relationship they should be cautious not to “come in with the prescription” and assume they know all of the answers for industry.

Fail to deliver on commitments

Participants identified the danger of “escalating efforts disproportionately” between ENGOs and industry. This simply implies that effort, resources, and commitment must be kept proportional between all parties in the collaboration. ENGOs should avoid taking commitments out of context, as this can lead to failed relationships as well. Another issue raised was the ability to “walk the talk” as an ENGO while at the same time you are demanding change in industry. This is especially sensitive in an organization that does both advocacy and consulting.

Industry

Have corporate messaging that’s inconsistent with corporate action

Greenwashing by corporations was consistently brought up during the workshop by ENGOs as an example of poor industry behavior. If a corporation provides “lip service only” to their environmental commitments and in the end has bad performance, all integrity is lost in the relationship. Whether the company had good intentions from the beginning or they were just buying the loyalty of an ENGO, if they don’t follow through internally or “on the ground” with their commitments, the company could be accused of having a hidden agenda.

Play the denial game

Industry yields an incredible amount of power in society today. With that power comes the responsibility of acknowledging problems, accepting fault when appropriate, searching for solutions and ultimately paying to implement those solutions. It is inappropriate for industry to deny their influence or hide behind government or associations when they are culpable.

Send in the wrong person

Having the appropriate representatives available for collaboration makes progress much smoother. One example of sending in the wrong person came from a participant who referred to “suits in community settings.” Higher-level executives may create an uncomfortable atmosphere in certain situations. On the other hand, if the individuals sent in to collaborate have no authority to commit or lack the right skills to represent the company, it can be just as detrimental to progress. Industry representatives must also be sure to not take actions or decisions personally.

Make false assumptions about the skill-set or position of an ENGO

TLF participants voiced their frustration of industry accusing ENGOs of “living in a fantasy world.” Actions that marginalize ENGOs and make them feel inadequate can only harm future relations. Just as ENGOs need to be flexible in their prejudgments, industry must also avoid making assumptions about the opinion or abilities an ENGO might have. One recommendation was for industry to work with many diverse ENGOs to learn from their varied perspectives.

1.5 What are some of the underlying conditions for successful collaboration?

Drawing from the results of best and worst behaviors of ENGOs and industry, participants came up with four primary conditions for successful collaboration. It is important to include the right people in collaborative efforts to ensure a successful project. Real measurable actions beyond empty promises were also suggested. Participants detailed the financial and organizational support requirements for long-term collaboration, and finally agreed that a common goal was central to establishing a successful relationship.

The right people are at the table with a clear understanding of their roles

Participants agreed that a crucial element in collaboration is having the right people involved, including an effective leader. It can be frustrating for an ENGO to work in collaboration with a company that doesn't provide them access to decision-makers. When their recommendations have to pass through several levels of bureaucracy, the message can be lost. Once the correct group is formed, among the most important features of a successful collaboration were trust, honesty, respect, flexibility and consistency. Also mentioned was the establishment of distributed leadership roles for each situation, particularly in tri-partite projects.

There is a commitment from both sides to actively pursue solutions

TLF participants were keen to collaborations that resulted in specific actions and moved “beyond chat.” In order to accomplish this, the goal must be specific and the commitment to achieving it must permeate through all layers of the organizations. Risks can be a very powerful motivator to get the ball rolling and to ensure that participants are solution-oriented in their approach.

The necessary time, resources and support structure are in place for both sides

Throughout the workshop, TLF participants identified numerous criteria that would be required from both sides of the collaboration partnership. Financing was a common theme in many discussions. Some suggestions included sustainable core funding as well as intervener funding. ENGOs are interested in receiving sufficient funding with no strings attached to achieve effective, meaningful collaboration.

Beyond financial support, the organizational structure of the groups involved must be accommodating to collaboration. An adequate number of staff with expertise in critical areas, such as human resources or technical skills, is necessary to provide logistical support. Time and flexibility to consider all options were also mentioned as beneficial to collaboration.

There is some common ground and clear wins and risks at stake for both sides

Participants recognized that when ENGOs and companies put their disagreements aside, they are able to identify clear points of agreement and establish common goals. By acknowledging a mutual benefit for collaboration and approaching the process with a win-win mindset, ENGOs and business can create a “collective definition of success.” A good start for these collaborations is to find an issue, value or focal point on which to concentrate.

1.6 What are the imperatives for increasing collaboration between ENGOs and industry?

Participants agreed with the importance of ENGO-industry collaboration, and overwhelming supported increased collaboration in principle. In moving initiatives forward, however, participants outlined a number of imperatives that should be met:

We must work together to find the appropriate participants to pursue these initiatives

Participants identified the need of finding the right people to carry on the momentum of this initiative. TLF participants saw the involvement of both interested and affected parties in the process as a more efficient way to “get the work done.” Different participants will be able to offer different resources, creating the opportunity to share facilities. It was mentioned that the creation of an ENGO-industry group around a common issue with CEO involvement would also be beneficial. Both groups should work together to mobilize community members around these issues.

There must be networking opportunities to get different groups interested and involved

Participants were eager to attend future retreats for ENGO/industry/government to examine the largest issues affecting these groups (e.g. economic growth, wildlife, energy futures, posting of mineral leases, etc.) Creating a “regular [and] ritualized forum” for ENGO and business to meet will ensure this initiative continues to develop. Connecting the two communities of business and ENGOs through one-on-one meetings around a key issue, or sitting as members of each other’s boards are two formal ways to enable communication. Some informal ideas brought up were “beer chats” or “take an ENGO to lunch.”

Education is critical to creating mutual understanding and building capacity

Hands-on experience during successful collaboration projects between industry and ENGOs is a good example of joint learning. These success stories should be shared in a forum to encourage the transfer of innovative programs and ideas to new groups. Hearing these examples may spark interest in an ENGO or business and help identify specific issues around which they could engage. Learning materials such as a resource book containing best practices for stakeholder engagement or a “dummies guide to ENGO/business collaboration” were some prospects named by participants.

Other opportunities offered to build consensus were “lunch and learn services,” field trips, secondments and a mentoring program. Another beneficial program mentioned by participants would be the development of a university session that introduced ENGO/business collaboration to the academic community. Writing case studies for MBAs was also suggested to involve advanced students before they enter the workforce.

Reliable funding must be secured to ensure collaboration efforts last

Administering this initiative will require monetary support from many sources to enable long-term outcomes. It was stated that government support has “declined or disappeared” recently and so participants came up with some alternative sources for funding. Some new ideas for monetary resources included collaborative funding between ENGOs, money directed from environmental fines and rate riders. Traditional requests for foundation money (e.g. McConnell) was also mentioned.

Government must be consistently approached from all parties to improve policy and reiterate the importance of this initiative

Participants clearly stated that government must be pressured to create “better environmental policy across the board.” Once this improved legislation is created, it must be enforced. An example of superior legislation is “tax shifting” to encourage environmental responsibility and punish environmental negligence. Creating consistent standards across the country could benefit both corporations and ENGOs, reducing the learning curve for the minutiae of environmental policy.

2.0 Next Steps

Continuing the momentum of the workshop was identified as the single most important aspect of furthering this initiative for increasing ENGO/business collaboration. Participants said overwhelmingly that the dialogue started at the forum needs to continue. In the follow up interviews and evaluations they said “great start, need to ensure follow-up,” “there is a lot more work to be done” and “the dialogue has to continue.”

The Pembina Institute has committed to keeping the dialogue going. Specifically, it will develop a plan of action for achieving the two categories of recommendations emerging from the forum: **developing informal and formal networking and dialogue opportunities**, and **developing models and tools for collaboration**. A plan for ongoing Business/ENGO networking and collaborative learning could encompass such forum ideas as ‘take an ENGO to lunch’ and ENGO-Industry ‘dating’ services, secondments, regional dialogue/networking events, and issue-specific workshops. A plan for models and tools for collaboration could also encompass key forum suggestions, such as a jointly authored ENGO-industry guide to stakeholder engagement best practices, ENGO-led awards for upstream oil and gas best practices, a ‘road show’ on the keys to successful collaboration and a website with collaboration case studies.

As noted in the “imperatives” section, reliable funding must be secured to ensure collaboration efforts last. To help it develop the plan, and to jump-start the fund development process, Pembina will seek the advice and support of forum participants during February and March of 2007. From there Pembina will circulate the plan to ENGOs, governments, companies and foundations not present at the forum, but interested in the topic. With a road map pointing the way forward, it hopes to translate the excitement generated that day in November 2006 into a lasting commitment to positive, proactive, and sustainable ENGO/business collaboration.

3.0 Appendices

3.1 List of Thought Leader Forum attendees

First Name	Last Name	Position	Organization
Leslie	Adams		Protect Our Water and Environmental Resources (POWER)
David	Arbuthnot	Chief Operating Officer	Global Energy Services Ltd.
Vicki	Ballance	Associate	R. McManus Consulting Ltd.
Meghan	Beveridge		Bow Riverkeeper
Brian	Bietz	President	Bietz Resources Ltd.
Erin	Bishop	MBA Candidate	Haskayne School of Business, University of Calgary
Don	Dale		KAIROS
Glynn	Davis	Manager, Community Engagement & Social Responsibility	Trident Exploration Corp.
Farhan	Farshori	Business Development Manager	Global Energy Services Ltd.
Keith	Ferguson		Sierra Legal Defence Fund
Adam	Fritz	Policy Advisor, Stakeholder Relations and Consultations	Environment Canada
Fred	Gallagher	Executive Vice-President, Gasification	TransAlta Inc.
Lois	Garrett	Manager, Upstream Environmental Operations	Husky Energy
Mike	Gatens	Chairman & CEO	Quicksilver Resources Canada Inc.
Kevin	Gu�erin	Director, Stakeholder Relations and Consultations	Environment Canada
Mac	Hickley		River Valleys Committee
Kristina	Hunter		Manitoba Eco-Network (chair) / University of Manitoba (Instructor)
Alison	Jamison	Senior Researcher	Corporate Consulting Services, Pembina Institute

Duncan	Kenyon	Independent Consultant	
John	Kerkhoven	Manager, Stakeholder Relations	Petro-Canada, North American Natural Gas
Graham	Kissack	Director, Sustainability	Catalyst Paper Corporation
Dennis	Kohlman	Senior Environmental Planner	Petro-Canada
Karen	Kun	Publisher	Corporate Knights Inc.
Lianne M.	Lefsrud		Association of Professional Engineers, Geologists and Geophysicists of Alberta
Pat	Letizia	Executive Director	Alberta EcoTrust
Ashley	Lubyk	Program Assistant	Clean Calgary Association
Bill	Luxton	Director, Corporate Training-North America	SAIT Polytechnic
Connie	MacDonald	Communications Director	Canadian Mountain Holidays
Rochelle	Maitripala	Sustainable Development Coordinator Sustainable Development, Public Affairs & Technology	Shell Canada Limited
Timo	Makinen	Climate Change Strategies Advisor	Shell Canada Limited, Oil Sands
Tom	Marr-Laing	Senior Associate Consultant	Pembina Institute
Brian	McConaghy	VP, Community Safety and Environment	TransCanada
Matt	McCulloch	Co-Director	Corporate Consulting Services, Pembina Institute
Joyce	McLean	Director, Strategic Issues	Toronto Hydro Corporation
Rob	McManus	President	R. McManus Consulting Ltd.
David	Morris	Sr. Community Relations Representative	Quicksilver Resources Canada Inc.
Dave	Poulton	Executive Director	CPAWS, Calgary-Banff Chapter
Susan	Quinn		KAIROS
Geneva	Rae	Policy Analyst	Canada West Foundation

Marlo	Raynolds	Executive Director	Pembina Institute
Doreen	Rempel	Community and Regulatory Affairs Manager	Quicksilver Resources Canada Inc.
Bart	Robinson	Hub Program Director	The Natural Step Canada
Kara	Rowan	Environmental Advisor	FortisAlberta
Mark	Rudolph	President	justenvironment
Craig	Stenhouse	CSR Advisor	EnCana Corporation
Jason	Switzer	Associate, Natural Resources	International Institute for Sustainable Development
Gareth	Thomson	Executive Director	Alberta Council for Environmental Education
Kirsty	Venner	Manager, Environmental	Trident Exploration Corp.
Helene	Walsh		Canadian Parks and Wilderness Society
Ed	Whittingham	Co-Director	Corporate Consulting Services, Pembina Institute
Bruce	Wilcoxon	Team Lead, Environmental Stewardship	ConocoPhillips Canada
Monique	Wilkinson	Senior Environmental Advisor	FortisAlberta
Alan	Young		Canadian Boreal Initiative
Gaby	Zezulka-Mailloux	Senior Researcher	UTSB Research
Chris	Zimmer		Transboundary Watershed Alliance
Peter	Zimmerman	Ecosystems Market Segment Leader	CH2M HILL

3.2 Thought Leader Forum Agenda

Purpose of the Forum:

To help to build a platform for more effective inter-sectoral partnerships, founded on mutual understanding and common goals by:

- Exchanging experiences with ENGO-industry engagement

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- Discussing the benefits of ENGO-industry engagement and underlying conditions necessary for successful engagement and collaboration
 - Considering what should happen next

What success looks like:

- More social capital and networks developed between participants
- More common understanding of the benefits and underlying conditions necessary for successful engagement and collaboration
- Sense of direction on what should happen next

Agenda: (1-5:15 pm)

Set up:

- Participants were pre-assigned to tables of seven people (comprised of a mix of ENGO and Business representatives)
- Each table will have a facilitator/recorder
- A room of adequate size with a window with a view was selected; each table was enhanced by some seasonal foliage.

1:00-1:15

Welcome

- Welcome folks, share your vision that lead to conceiving of this session, and outline the purpose of the session and therefore who is in the room, How will info be fed back to them? (Pembina Host)
- Agenda, housekeeping, instructions, use of 'singing bowl' (Monica)

1:15-1:45

1) Introductions

(In groups of 7 at their tables; about 3 minutes each.)

- Name, affiliation, where they are from
- What experience (related to ENGO/Private sector collaboration) have you had that brought you to the meeting today?
- What would you do with two million dollars?

1:45-2:00

2) What are the benefits of ENGO / Business collaboration?

('Speed dating approach': 8 minutes on the question with a one minute report out from each group. Identify who the group reporter will be. Facilitator records discussion on flip chart)

- So what? Why do we care about ENGO / Business collaboration?

2:00-2:45

3) Everything you ever wanted to know about ENGO/Business collaboration but were afraid to ask

(Set up like a Coaching session: Seat ENGOs and Business across from each other. Start with ENGOs asking the questions of Business, then switch after ~20 minutes for each. Facilitator records discussion on flip chart)

- What is the best thing that ENGOs/Business do or could do?
- What is the worst thing that ENGOs/Business do or could do?
- How can we work together better?
- Other burning questions...

2:45-3:00 BREAK

3:00 -3:30

4) Conditions for successful collaboration

(10 minutes per question; Facilitator records list of ideas.)

Questions:

- 1) What are the conditions necessary for successful collaboration?
- 2) Is additional capacity needed by both Business and ENGOs to support successful collaboration? If so, what does that look like?

3:20pm (tent.) One minute report out: top idea from each group.

3:30-4:15

5) Next Steps/Action

(Facilitator records list of ideas)

- What needs doing the most?
- What specific projects or actions should happen next?

4:15-5:00

6) Building the Game Plan: Further developing our best ideas for action

- What specific projects or actions would you like to develop further?

(In Plenary, harvested top idea from each of the 7 groups; Ed recorded; Monica synthesized and categorized the key action ideas; champions were recruited to take the ideas further over dinner)

5:00-5:10

7) Wrap-up: Pembina

- Now what from Pembina?
- How did this work for you? Evaluation forms distributed.

3.3 Comparable ENGO-industry Collaboration Initiatives

Green Drinks International

<http://www.greendrinks.org/>

Green Drinks was founded in London, England, in 1989 by a green designer after an impromptu gathering at a local pub. Groups are now in about 185 cities around the world, including in Japan, Chile, India, Australia and across Europe. The attendees include a mixture of people from NGOs, academia, government and business. It is a way of catching up with acquaintances and also for making new contacts. Participants are encouraged to invite others so that the crowd is diverse and always changing. Meetings have resulted in employment opportunities, the development of new ideas, collaborative agreements and friendships between members, among other things.

- Monthly meetings
- Informal, simple and unstructured social gatherings
- Environmentally focused participants
- Cross-sectoral

Young Environmental Professionals (YEP) Canada

<http://www.yepcanada.ca>

Young Environmental Professionals (YEP) is a volunteer organization dedicated to promoting opportunities for young and emerging environmental and sustainability professionals. In August 2004, YEP's membership reached 500 members, involving over 1000 people in its knowledge network and hosting over 50 events for members.

- Canadian organization started in Toronto in November 1997
 - Additional chapters in Vancouver, Calgary, Edmonton and the National Capital Region
- Offers casual atmosphere for networking.
- Meetings occur once a month and usually involve an expert speaking on an environmental subject.
- Delivers opportunities for members to learn, network with peers and mentors, find employment, discuss public policy and participate in community initiatives.

The Partnering Initiative:

<http://thepartneringinitiative.org/mainpages/rb/signposts/>

Established in January 2004, The Partnering Initiative is a global programme of the Prince of Wales International Business Leaders Forum (IBLF) in association with The University of Cambridge Programme for Industry. The focus is on developing and disseminating cutting edge knowledge and methodologies for developing effective cross sector partnerships for sustainable development. They also provide tailored learning programmes, professional skills development, and finally partner review and evaluation.

The Partnering Initiative also provides support and advisory services that help to build capacity for effective collaboration for sustainable development. Their approach combines thought leadership, professional learning opportunities and the coordination of innovative joint ventures.

Their objective is to:

- gather, generate and disseminate knowledge on the strategy and practice of cross sector partnering;
- improve the quality of cross sector partnerships and the partnering process; and
- develop partnering capacity.

They do this by working with organisations and individuals, in all sectors, to undertake commissioned work and establish 'creative connections' that develop innovative approaches to cross-sector partnering for sustainable development.

Business and Sustainable Development Global

<http://www.bsdglobal.com/>

This site explains the strategies and tools that companies can draw on to translate an aspiration of sustainability into practical, effective solutions. Case studies from around the world are provided as an example of each measure.

The site's six sections cover:

- Current issues: briefings on specific sustainable development topics from a business perspective
- Strategies and tools: how to incorporate the principle of sustainability into everyday business activities, illustrated by real-life examples
- Markets: business opportunities arising from sustainable development
- Banking and investment: spotlight on how sustainable development is being approached by the financial services industry
- Working with NGOs: how businesses are forging working partnerships with lobby groups
- Training opportunities: how universities and professional training providers can help industry leaders incorporate sustainability into their business strategies

Business Partners for Development

<http://www.bpdweb.com/>

Business Partners for Development (BPD) is a project-based initiative set up to study, support and promote strategic examples of partnerships involving business, civil society and government working together for the development of communities around the world. It was created, believing that tri-sector partnerships could provide long-term benefits to the business sector and at the same time meet the social objectives of civil society and the state by helping to create stable social and financial environments.

BPD Partners spent three years working intensively with 30 "focus projects" (i.e. pilots) in 20 countries and grouped into four "clusters". The purpose of the Business Partners for Development "focus projects" was to share practical experience building partnerships and to learn together how to achieve the greatest impact on businesses and communities. These include:

- **Natural Resources:** (oil, gas and mining companies) to develop guidelines / systems / structures for dealing with community issues and mitigating risk by optimizing development impact on host communities through tri-sector partnerships. Co-convenors: BP Amoco, WMC Resources Ltd, CARE International and the World Bank Group.
- **Water & Sanitation:** to identify specific lessons learned about partnerships from existing projects which are providing responsive and affordable water services to urban poor and to demonstrate that these can be replicated and scaled-up to national and regional levels. Co-convenors: Générale des Eaux (Vivendi), WaterAid and the World Bank Group.
- **Global Partnership for Youth Development:** to identify and share what works in building successful partnerships for youth, the next generation of labourers and consumers. Then to create/work through existing national and global infrastructures to mobilize significant new resources in order to strengthen and scale up best practices in youth development. Co-convenors: Kellogg's, the International Youth Foundation and the World Bank Group.
- **Global Road Safety Partnership:** to reduce deaths, injuries, disabilities and associated social costs of road traffic crashes through collaboration and coordination of road safety activities. Co-convenors: the International Federation of Red Cross and Red Crescent Societies and the World Bank Group.