

Community Corporate Engagement

A Toolkit to get a Corporate Partner

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The origins of this work can be traced back to 2006 when I was invited to participate in an applied research study alongside a small community-based organisation. In undertaking this initial research it soon became clear that various unforeseen complexities existed in forming and maintaining relationships between the corporate and community sectors. Cross sector relationships between local community groups like our research partner and their corporate supporters would not, in all cases, immediately “click”. Importantly, the complications that surfaced were in no way attributed to a lack of will or effort on both sides. Quite the opposite was found to be the case.

The corporate funder in this instance demonstrated great interest in building the capacity of local community groups, and along with the provision of funding, developed a framework to help manage such relationships and offer training to the organisation’s management. Likewise, key management staff within the community organisation were very keen to meet what they understood to be set requirements of their funding agreement, making considerable efforts to exhibit how they functioned as an accountable and effective organisation.

As the research progressed, it became clear that both institutions were operating under differing assumptions. For example, the community group was primarily mission driven, with a distinct priority on the processes of their work. In contrast, the corporate funder expected tangible evidence of program success, which was only achieved through identifying and measuring outcomes. Perhaps more importantly, the corporate institution was not supporting the organisation just because “it was the right thing to do”- they were also aligning with their strategic interests and their own identified priority areas. Good intentions, while clearly important, were not sufficient on their own.

This latter point which centres on the strategic imperative of corporate behaviour proved a recurring theme in the research following this earlier study. Since then, a wide ranging qualitative study on community-corporate relationships has found this gulf in assumptions to be a widespread phenomenon. Further applied work undertaken in 2012 by Western Sydney

Community Forum (WSCF) through the Community Corporate Intermediary (CCI) Project certainly indicates that clear challenges persist for community organisations wishing to engage with the corporate sector. This challenge is particularly stark for resource and time poor locally-based organisations wishing to strengthen their financial sustainability, and ability to benefit their communities and clients.

My recommendation to those organisations considering their approach to the business sector support is to not be fazed. Knowledge of community-corporate engagement in Australia is increasing, and it is hoped that applied resources – such as this toolkit – will assist in alleviating some of the difficulties or barriers to partnership building.

It is not possible to thank all individuals who contributed to this work. However, I would like to express my great appreciation to WSCF for their foresight and support over the past five years. The University of Western Sydney and Westpac Foundation also played instrumental roles in lending both resources and expertise to the wider research. Finally I would like to pay tribute to all of the wonderful people I have met from non-profit, corporate and government sectors who have contributed their time and effort to both the research and the CCI project. In doing so, you have ensured that knowledge of community corporate partnerships is disseminated to a wider audience.

Dr Christopher Roffey

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Aim and Scope of the Toolkit

This toolkit is designed as a guide for not-for-profit (NFP) organisations to strategically engage with corporations and businesses. It promotes building both effective and mutually beneficial community-corporate relationships. To achieve this end, the toolkit provides background information about the current movement towards strategic corporate engagement. Examples are given of how this translates to the types and styles of community support provided by corporations.

Tips about how to engage with a potential corporate partner are also provided. These strategies encompass more than just replicating the languages and approaches of the corporate sector. Rather, NFPs can use this resource to better understand the different ways corporations engage with the community sector and select an approach that is most appropriate for them. The final section identifies some principle types of cross sector collaborations that can be found in Australia along with some further resources and tools.

It is important to emphasise that there is no “best practice” method in terms of corporate engagement, nor is there one single or universal clear-cut way of forming and maintaining partnerships. Rather, this document is designed to both inform readers and equip them with the ability to identify partnership types and strategies that fit with their unique capacities, contexts and needs.

Target Audience

The principle target audience for this toolkit are managers of community organisations, as well as board members and other key personnel within the community sector. This publication has been specifically designed to guide small to medium NFPs who do not have dedicated staff that engage directly with corporations and businesses.

However, this work also summarises significant research findings conducted over a six year period. As such, some sections may also be of interest to an academic audience. Rather than keeping the two separate, it is argued that publications designed for professionals within the community and academic settings need not be mutually exclusive. Community groups can

benefit from being cognisant of wider systemic forces that inform institutional policies and practices. Likewise, academic audiences can also benefit from greater mindfulness of actual experience, as well as the applied implications of social research.

Recent trends in Australia

History and context

The scope of individual and business giving (or philanthropy) in Australia has been relatively modest in comparison to other countries. For instance, in the USA a significant and enduring culture of elite philanthropy emerged as a product of industrial development during the 19th century (Ostrower, 1995), whereas institutional charity and philanthropy has been a part of economic and social structure in the United Kingdom for centuries (Prochaska, 2006). Australia, by contrast, has relied considerably more on contributions from local volunteers, faith-based charities and other grass-roots associations in undertaking community work and charity – a role eventually supported by governments of all levels through direct funding (Murphy, 2006).

Until recently, it would have been difficult to locate a significant culture and economy of local philanthropy. Some notable exceptions in Australian history include the significant roles played by individual philanthropists, such as Sidney Myer, in investing a large share of their family wealth in various institutions and communities (Liffman, 1999).

The extent of corporate involvement in the Australian community sector has been similarly small in scope, although interest in corporate social responsibility (CSR) and corporate citizenship has grown since the late 1990s. Research has shown levels of corporate support for not-for-profits (NFPs) to be increasing (Cronin and Zappalà, 2002, Lyons and Zappalà, 2008), taking on a diversity of forms – from direct funding and in-kind donations, to less direct avenues of support such as access to corporate networks and marketing assistance (Centre for Corporate Public Affairs, 2000).

Today, there are thousands of grant-making organisations, providing support to many social, economic, cultural and environmental causes.

However, research has found that corporations remain hesitant in funding specific community groups over the long-term (Batten and Birch, 2005). This poses unique challenges for community organisations, as funding across the board – be it from government, businesses or individuals – is progressively lacking in both security and certainty.

For community sector managers to engage effectively with organisations from other sectors, the first step is in understanding the motivations, values and expectations found therein. Appreciating how such underlying factors help to inform why individual corporations engage with communities is useful on a number of levels. For example, underlying motives, values and expectations can directly influence:

- The activities corporations and trusts choose to support.
- The mode of assistance provided.
- Internal monitoring and accountability processes underpinning collaborative structures.
- Specific outcomes or benefits anticipated by each side.

From philanthropy to corporate strategy

Trends suggest that decision-makers in corporations and foundations are gradually moving away from a philanthropic framework of grant-giving towards seeking more “strategic” ways to support communities. Recent research has found that of all corporate representatives interviewed, 87% revealed that they either worked under or were intending to move towards a strategic approach in their community engagement practices (Roffey, 2012). This trend has been constantly described as a significant departure from arms-length philanthropic giving which had previously dominated relationships between the two sectors.

To businesses, strategic investment embodies a more meaningful way of engaging with the community sector, and one indication of this is a preference for services and charities that align with the values, objectives or interests of the donor institution. A recent report by World Vision (2010) highlighted similar trends where Australian companies are looking to expand the

“depth” of their community investment, rather than its “breadth”.

One clear development is that **corporations are far more likely to support community projects or activities rather than an organisation as a whole**. The rationale for this is presented further below. For community sector organisations, these movements pose new and confounding challenges. When the question of corporate funding is raised, managers of NFP organisations often ask “What do I have to offer the corporate sector?”. The short answer, in many cases, is a lot! However, there are various considerations that help to inform partner development, and these differ substantially between the two sectors.

In order to attract a corporate supporter, it is first useful to understand the motivations and preferences of corporate sector decision-makers. Exploring some of the ways strategic alignment works can save you time, and will enhance your organisation’s capacity to engage more effectively.

Emerging types of strategic alignment

Strategic community corporate involvement notably embodies very different ways of thinking and operating to those found in the community sector, and even to those previously underpinning philanthropic giving. A previous WSCF publication has already pointed to different ways in which language can be used across the community and corporate sectors (Roffey, Darcy, Keenahan & Varua, 2012). However, strategic engagement poses many practical challenges to prospective community partners. Perhaps most important to strategic community involvement is in how corporations are now seeking to draw mutual-benefit out of cross-sector partnerships.

“Mutual benefit can reflect a spirit of compromise, a need to balance organizational imperatives with joint effort. It can also indicate inequity. Analyzing your partner’s language can help decipher which way it falls”

McQueen, 2004, p. 22

As the quote by McQueen (2004) suggests, NFPs need to be careful about the language used to frame collaborative endeavours. Despite use of the words “partnership” and “collaboration”, it is worth noting that not all relationships are equal.

Below are three avenues where mutual benefit may be sought:

1. Brand alignment

Community organisations may be selected due to the level of public trust or respect afforded to their brand. For a business, being able to position alongside a widely known organisation is highly valuable in engaging better with their staff and customers. Brand alignment also serves various marketing purposes, for instance, in repairing damaged corporate reputations or in accessing new customer groups or market opportunities.

It is also worth noting that businesses tend to be risk-adverse, which naturally influences their community corporate involvement strategies. As a result, businesses will usually steer clear of NFPs deemed to have a “tainted” public profile, or those that are overly political or religious in their core mission.

2. Values alignment

Most websites of major corporations tend to include a “community” section that lists the values and areas in which they endeavour to give back in the community. For instance, many representatives interviewed in previous research had listed education as a key area of mutual concern with their partnered NFPs. The reason for identifying this issue was often attributed to the level of education and expertise found in the corporate sector workforce. Supporting targeted education programs enables marginalised young people to, one day, access similar opportunities to those experienced by corporate employees.

Generally, businesses like to see how their contributions make tangible differences to people’s lives, which is a major reason resources are primarily directed to community activities or projects rather than organisational structures.

Other businesses viewed values alignment in different ways. According to one corporation, their preferred approach to selecting partners is to locate those issues most identifiable and

relevant to staff. Given that the majority of employees within one company were men, community partners who were most valued were those predominantly dealing with emergency or rescue related services.

Despite the potential for haphazard and inequitable distribution of funding¹, knowing the demographic makeup of key corporate stakeholders (such as employees or customers) is one useful way to locate opportunities for values alignment.

3. Staff engagement

Although the stated objective of partnerships are often built on the intention to address social or community needs, services that engage directly with company employees are becoming increasingly popular. Some Australian corporations such as NAB have integrated significant employee volunteering schemes into their business practices. Doing so enables businesses to build closer ties within the communities in which they operate, and exhibit strong CSR credentials while positioning themselves as an employer of choice to prospective and existing staff members.

Despite clear interest towards developing a strategic approach to corporate social responsibility (CSR), it is important to note that community corporate investment in Australia remains in a state of transition. Research has consistently found that many companies appear to conduct their engagement without a strong strategy or framework (Downes, 2012, Zappalà and Cronin, 2003, World Vision, 2010). For example, each of these studies revealed that levels of employee engagement – one principle indicator of strategic investment – remains low when compared to more traditional forms of corporate support.

Considerable diversity in approaches may also be found between specific industries. For instance, research has identified mining corporations as being primarily philanthropic contributors through significant and direct ad hoc funding, while other industries such as banking, financial

¹ It is a reality of corporate philanthropy that support is often directed toward “safe” social causes (i.e. those with existing and widespread public support). However some exceptions to this trend exist.

services and retail are considerably more strategic in their approach (Downes, 2012). These industries are relying instead on the provision of employee time, different levels of funding and in-kind support, as well as cause-related marketing campaigns. Research conducted by UWS (Roffey, 2012) also highlights law and accounting firms as being varied in their approach, where the focus is often on their immediate geographical proximity (this is understandable given the time pressures felt by staff), while supporting partnered organisations through in-kind use of office space and the provision of highly specialised pro bono services.

This overall complexity poses significant challenges to community organisations. For one, the stark differences in ways corporations engage with community services means that considerable research is now required to ensure that organisations wishing to solicit support will be effective. It is also clear that somewhat different grant seeking strategies are needed in approaching corporations for support when compared to the approach taken in seeking funding from foundations or trusts². While both forms of assistance are valuable, the focus of this document is predominantly on the intricacies of direct community- corporate involvement.

Social impact assessment

By adopting a strategic approach to community investment, businesses are increasingly looking for ways to evaluate the effectiveness and “value for money” of those organisations and causes they choose to support. There is little agreement about how best to measure the social outcomes and impact of community activities. Moreover, many argue that it would be irresponsible to impose a blanket “best practice” model upon all funded services, and indeed many respondents interviewed – both from the corporate and

community sectors – recognised this difficulty. Clearly, community organisations with rigorous and creative monitoring and evaluation processes that can provide evidence of program success are highly attractive to corporate supporters.

There are a variety of ways community service activities may be measured. Some popular options include:

- Inputs assessment: An evaluation of basic financial compliance.
- Outputs assessment: An evaluation of client numbers or services/goods delivered through a program.
- Performance milestones: The ability to meet predetermined key performance indicators (or KPIs)
- Social impact: The examination of wider social and/or ecological outcomes. More recent studies have explored ways to forecast the financial savings resulting from specific community interventions or activities.
- Business outcomes: The measurement of business rather than, or in combination with, community outcomes is becoming increasingly common. Examples may include an assessment or the ability of the corporate partner to maintain staff, strengthen its public image, and improve its reputation and overall profitability through supporting an activity or social cause.

The current standard of reporting on CSR activities remains limited at best. However, it is clear that corporations wish to see partner organisations move beyond basic financial compliance or outputs assessment. Businesses are very keen to understand how their “financial investment” has resulted in lasting social change for the nominated target groups. Moreover, it is increasingly common for this information to be included in corporate websites and annual reports. Many in the community sector would appreciate the difficulty in identifying success factors, let alone evaluating the full impact of one-off or short-term financial contributions. Real social impact may take years to fully comprehend, requiring highly sophisticated evaluative tools and methodologies. Nevertheless, some including the

² Considerable support is already available for organisations interested in seeking grants from charitable trusts. For instance, Philanthropy Australia (<http://www.philanthropy.org.au/publications/guide-to-grantmaking.html>) has published an introductory manual on grant seeking, available free of charge. WSCF (<http://www.wscf.org.au/training>) provides training specifically geared towards the needs of small community service organisations.

London Benchmarking Group³ and United Way Australia⁴, are seeking to develop evaluative frameworks that measure the wider impacts of community-corporate involvement.

Difficult choices are involved when planning and undertaking program measurement. Research suggests that it is important to match measurement options with the specific program delivered by an organisation (Ebrahim and Rangan, 2010, Zappalà, 2011). For example, social impact measurement may prove inappropriate for activities involving the participation of only a small number of people in a very localised region – in which case inputs, outputs, participant evaluations and case studies remain the most appropriate short-term tools. Deciding when it is appropriate to measure such inputs, outputs, outcomes, influences (intermediate outcomes) or impacts depends on the specific situations and contexts, and the final evaluative framework should ideally be developed in collaboration with all relevant stakeholders (including funders, staff and client representatives).

In summary, careful consideration is needed in identifying which approach best matches the scope of an activity as well as an organisation's capacity and level of expertise. To some smaller organisations, it may actually be a sound strategic move to not accept support from companies wishing to see long-term social impact assessments, due to time and resource demands associated with such forms of measurement. To others, the form of corporate support solicited may, in fact, be centred on assistance with implementing internal monitoring and evaluation systems or on up-skilling organisational staff to do so themselves.

³ <http://www.lbg-australia.com/>

⁴ <http://unitedway.com.au/2012/07/charting-a-course-for-change-advancing-education-income-and-health-through-collective-impact/>



Strategising Your Approach to Partnership Development

Strategising Your Approach to Partnership Development



Corporations and businesses hold significant sway over defining the terms of community engagement and the way partnerships are structured. Despite the clear potential for power imbalance within cross-sector partnerships, there are ways community organisations can best prepare for the road ahead and take steps to ensure their objectives are met. Decision-makers in community service organisations should themselves begin to think strategically in how best they can approach the corporate sector. This presents a significant break from the common assumption in Australia that corporations are “the funder of last resort”. Taking a strategic approach will also help minimise an unnecessary waste of time, resources and personal effort expended in pursuing potential partners.

It is also worth keeping in mind that although corporations might appear disinterested and monolithic entities, many of their employees place considerable value in community

engagement activities and genuinely wish to “give back” to their local communities. As such, there is an aspiration to partner with NFP organisations that share in their passion and excitement for social change.

Conversations with representatives in both businesses and NFPs suggest that the development of meaningful and mutually-beneficial partnerships takes significant investment in time, resources, knowledge, commitment and momentum. Due to these demands, true collaborative partnerships and joint ventures remain few and far between, and are often located among larger, well-resourced charities.

Nonetheless there are a few avenues through which smaller and medium-sized community services can maximise their chances of success. Some of these steps are depicted in Figure 1 and detailed in the following section.





Ensure Organisational Readiness



Conduct Preliminary Research



Be strategic in the selection of corporate partners



Prepare your “pitch” to the corporate sector



Be persistent in securing support and planning ahead



Invest in maintaining and strengthening relationships





The Committee Encouraging Corporate Philanthropy (2012) identifies three criteria for organisations that should qualify for corporate funding. According to this international standard, to be considered for business sector support, community groups need to be formally organised, they must exist for charitable purposes, and their profits must be reinvested in achieving the organisation's social objectives. Most incorporated community organisations in Australia would fulfil this criteria, although the definition of "charity" is naturally expanded to other organisations involved in community development, advocacy and resourcing for marginalised groups and a wide variety of social services.

Taxation Status

Obtaining the deductible gift recipient (DGR) status is another step which is desirable to maximise an organisation's capacity to engage with the corporate sector. An organisation's ability to obtain grants and form significant partnerships with businesses is often (but not always) reliant on a community partner being a DGR. It is useful to have a copy of the letter provided by the Australian Taxation Office (ATO) in case a prospective corporate funder requires proof of your organisation's tax status.

Insurances

Organisations wishing to engage with corporate volunteers will also need other forms of insurance including Public Liabilities and Volunteer Accident Insurance certificates of currency. Many organisations already require these certificates in the everyday operation of their services, although it is a useful exercise to check that all insurance structures are in place before approaching the corporate sector. See resources for further information.

Marketing and Branding

The language used to describe the organisation's aims, mission, values and key programs is also very important. NFPs that are most successful in attracting corporate support are themselves highly "marketable" through a memorable name, clear brand and an ambitious but achievable social vision. Not all community organisations would wish to, nor should, amend these core structures without detailed discussions with internal stakeholders. An absence of proper stakeholder engagement in such rebranding processes can ultimately prove counterproductive in the long-term, especially if the result is the alienation of clients, volunteers and local communities.

Websites

One very important, but often overlooked, component to an organisation's capacity to attract corporate and other philanthropic funding is through a well maintained website. Many foundations, trusts, intermediaries and businesses do not accept unsolicited requests for funding from NFPs. Instead, many conduct their own internal research in pursuit of potential community partners. Organisations that do not have a website clearly spelling out the aims, objectives, activities, achievements and financial position (through making available recent annual reports), risk missing out on various collaboration opportunities. At the very least, organisational contact details should be available online in the event that a representative of a corporate trust wishes to offer you a surprise grant.

Summary

- Is your organisation a DGR?
- What additional layers of insurance will your organisation require for certain activities?
- Can you market your organisation to a corporate institution?
- Does your organisation have a well maintained and regularly updated website?



Considerable time and effort may be saved through researching funding institutions that share similar goals to your own. As mentioned previously, resources such as The Australian Directory of Philanthropy and various grant seeking workshops are useful ways to learn more about funding offered by foundations and charitable trusts.

Locating funding sources

Locating corporate funding sources is considerably more complex. One starting point is to search for corporations who are existing members⁵ of Philanthropy Australia. These businesses have already demonstrated a strong interest in CSR and most would have highly developed community investment strategies. Identifying businesses that operate in your organisation's local vicinity is another practical way to begin researching potential supporters.

"NGOs need to spend time understanding their objectives and developing a clear strategy to approach companies.... Proactively identifying the types of companies – and outcomes – that can best further the NGO's mission will help to embed partnerships into the organisation's core strategy"

World Vision, 2010, p. 20

Researching and understanding the potential corporate supporter

Further discussions with businesses revealed that grant seekers who can exhibit deeper knowledge of the business in their funding submissions are generally more likely to be considered for support. Major corporate funders can often receive up to two hundred requests for funding from NFPs, so demonstrating how your organisation's activity is both unique and best aligns with the mission and values of the donor is preferable. Alternatively, applying for grants without understanding the values, preferences and stated funding criteria of the corporate institution will likely be responded with frustration.

Networking

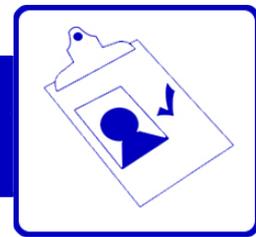
Direct funding is not the only form of corporate support and many different relationships emerge out of more spontaneous processes. In fact, research has found that a significant portion of cross-sector relationships emerge through personal contacts between individuals across NFPs and businesses, rather than through entrenched inter-organisational structures. Networking is thus an essential way to engage with decision-makers in corporate institutions, and attending events that facilitate such networking can be valuable. Speaking one-on-one with business representatives during AGMs, award ceremonies and fundraisers is a particularly efficient way to assess whether or not a "match" exists between your two organisations.

⁵ <http://www.philanthropy.org.au/membership/list.html>

Summary

- Which corporations have a high CSR profile?
- Which Businesses operate in your local area?
- Have you undertaken background research on the businesses you wish to approach for support?
- How can you more effectively network with individuals in the business sector?

Be strategic in the selection of corporate partners



One recommendation made by participants in the final stage of research⁶ was that community organisations should be far more discerning in their selection of corporate partners. The potential benefits of doing so are manifold.

Plan for the unexpected

Firstly, it has been found that choosing an appropriate partner can lead, not only to a positive experience, but years of unintended and surprising outcomes for your organisation, clients, and local communities. Sometimes hosting volunteering events have led to more long-term outcomes such as professional secondments to a NFP's board, further funding, in-kind use of high rise office space and access to corporate networks.

Seeking mutual benefit

Some of the most beneficial relationships comprise of multiple levels of engagement and eventuate in increased respect and regard for each partner. As McQueen (2004) found, the most effective cross-sector relationships are those that result in higher levels of social identification (evidenced by language that focuses on "we" rather than "us and them") and mutual understanding. Locating avenues for mutual-benefit is the most likely precursor to building a more meaningful and enduring relationship. Selecting businesses that match in terms of size, stakeholders or values can also result in fewer issues further down the track.

⁶ In the final stage of the UWS action research study, representatives from the business and community sectors were invited to participate in a search conference. This event helped to identify areas of good practice in collaborative relationships and develop alternative futures to overcome common challenges.

Reputation management

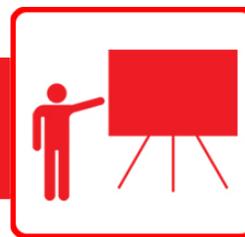
Forming an inappropriate partnership can alternatively have long-term negative consequences such as a waste in time and resources, internal disputes, dissatisfaction with project outcomes, the development of poor reputations among corporate funders, and an unwillingness to form similar partnerships in the future.

Community organisations often rely on high levels of public trust and a positive reputation in pursuing their aims and mission. Likewise, it is important that corporations selected for partnerships do not threaten these valuable assets. Given that reputations often take years to build, the chance that negative perceptions can arise through some corporate partnerships is a cause for concern and reflection. NFPs working alongside marginalised and vulnerable communities tend to take particular care in aligning with other institutions, and in many cases, there is good reason for such caution. However, discussions about how to balance questions of ethics with the practical need for additional financial support should be undertaken at both the staff and management committee level.

Summary

- Can you identify an alignment in values or stakeholders with any specific businesses or industries?
- Will the relationship be mutually beneficial?
- Have you considered the ethical or reputational risks in forming a community-corporate partnership?

Prepare your “pitch” to the corporate sector



Interviews and discussions with decision-makers in businesses and NFPs commonly pointed to the importance of language in facilitating or impeding cross-sector relationships. Western Sydney Community Forum’s recent publication, *Developing a Common Language between Corporations and Small Organisations: A Resource Handbook*, covered a number of the challenges facing both sides along with some suggested areas where accord may be reached. However, dangers exist when efforts to strike a common language result in one side “matching” the language of the other.

Speaking the corporate language

While matching language can be a useful way to ‘build rapport, establish connections, and maintain equal footing with a business partner’ (McQueen, 2004, p. 21), there is a risk that the values and processes important to the community sector are lost in translation. In contrast, many perceived differences can be a result of assumption rather than lived experience, where jargon and terminology found in each sector simply requires translation into plain language.

Use of everyday English that is comprehensible to an educated layperson is advised. However, it is important to emphasise the relevance of risk management, sustainability, accountability and program effectiveness to the proposed activity, as these themes matter to corporate sector decision-makers.

⁷ http://www.wscf.org.au/images/publications/WSCF_Common%20Language%20Resource%20Handbook.pdf

Pre-planning your pitch

Preparing a “pitch” to prospective funders is an important part of setting up your organisation’s capacity to get your message across effectively. There are many different types of pitches, from the one designed for a brief one-on-one conversation, to a professional 15 minute board room presentation. Philanthropy Australia recommends keeping a pitch short (approximately 30 seconds), and emphasise how your organisation’s work is innovative or important. This activity will help to narrow down the central elements of your work, and is particularly valuable in situations where you need to concisely explain to a potential supporter the value in aligning with your organisation.

Keep in mind that there are various ways an activity or your organisation may “align” with a corporate supporter so pinpointing how this can occur to a potential supporter will be useful. Corporate supporters are also looking to find specific ways to leverage their resources, skills and services, in ways that “add value” to a community program. Thinking creatively about how your targeted future partner can provide a unique contribution to a program is one way to stand out and generate interest.

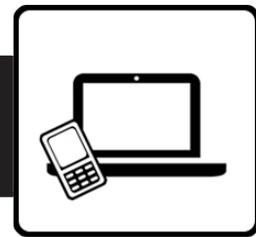
Balancing ideals with practicality

Finally, when preparing for a more professional pitch, it is useful to balance between striking the emotional “heart strings” with the hard reality of how a project or activity will be undertaken. Arriving to a presentation prepared with a budget, a timeframe, a list of anticipated outcomes and other relevant organisational documents (such as proof of DGR status and yearly balance sheets) is also important.

Summary

- Have you considered the language used in describing your organisation’s activities with prospective supporters?
- Do you have a quick pitch prepared?
- How can you emphasise the creativity, value, effectiveness and necessity of your planned activity to a potential supporter?

Be persistent in securing support and planning ahead



Some opportunities in engaging across sectors appear to unfold naturally. At times, corporate support is bestowed at a speed and determination that sits in stark contrast to traditional relationships between community organisations and government. For example, natural disaster events, such as floods or bush fires, commonly lead to a swift outpouring of support from the business sector.

In other cases, corporate engagement is a long and arduous process requiring considerable time and effort to nurture. While this is a time when momentum can stall and opportunities vanish, results can appear when persistence is shown.

Maintaining regular contact

Showing persistence, where appropriate, is particularly important for smaller organisations with lower public profiles.

Making regular telephone and email contact can increase the chance of maintaining the interest of a prospective supporter. Doing so indicates that you are both serious about the project and proactive in making sure it successfully gets off the ground.

Engaging and keeping in contact with more senior managers and executives has been found to be an effective strategy, as these people generally have considerable influence with regard to internal decision-making.

Funding timeframes

Being aware of funding timeframes can also be useful. While some businesses accept applications for support throughout the year, many larger corporations, charitable trusts and foundations take on a much more structured and prescribed approach. In these latter cases, planning ahead through being mindful of expressions of interest (EOI), submissions, and other key dates is essential.

Given the many forms and types of corporate support available, the strategy used to secure support must obviously match the specific requirements and nuances of the context through which you are operating.

Summary

- Are there specific strategies you can pursue in finalising a corporate partnership?
- What are the key funding dates prescribed by the corporate supporter?
- Do you have the time and resources necessary to nurture an emerging relationship with a potential supporter?

Invest in maintaining and strengthening relationships



Communication

Much has been said of the importance in nurturing and maintaining collaborative relationships. One common issue corporate representatives located during discussions concerned communication. Ensuring strong lines of communication between businesses and NFPs can build longer lasting and more resilient partnerships. Corporate partners are particularly interested to know when projects do not go according to plan, or when situations change.

Unlike government funding, there is often a capacity for greater flexibility with community-corporate partnerships, but this is only possible when both partners are fully aware of issues when they arise.

Utilising corporate sector skills and knowledge

Unlike in philanthropic relationships, joint venture or strategic collaborations require different skills sets and approaches to manage. For instance, businesses are increasingly open to offering advice to NFPs, and leverage their expertise in ways that can improve service delivery or an organisation's capacity to better respond to multiple internal and external pressures.

Corporations also possess considerable influence and have access to wider networks than most organisations in the NFP sector. These factors can be greatly beneficial for NFPs that operate in an increasingly uncertain economic and political environment.

Involving the corporate partner

Strategic collaborations usually comprise of closer ties between the donor and recipient (to the point where these lines are blurred). Including businesses in key decision making processes about a project, and further valuing their contributions will likely result in a more enduring partnership. Like all relationships, community-corporate partnerships are built on trust, so investing time and resources in maintaining partnerships can have many long-term benefits for both sides.

Enduring community-corporate relationships occur when business sector individuals "buy in" through investing their time and energy in a joint activity. Although many might not have the experience and expertise found in the community sector, corporate representatives can still identify creative and unique solutions to everyday problems and issues faced by management (particularly concerning funding, marketing, branding and legal issues).

Lastly, it is also beneficial to ensure that successes are celebrated jointly. Doing so ensures that all parties are dually rewarded for their efforts, and emphasises the clear positive outcomes arising as a result of the corporate investment.

Summary

- Do you have effective lines of communication with your corporate partner?
- What options are in place if things do not go according to plan?
- How can you ensure a corporate funder is engaged and key corporate staff members "buy in" to the partnership?
- Have you considered additional ways a corporation may strengthen your organisation's capacity and sustainability?



Case Studies

Granville Multicultural Community Centre "Going Local"



Granville Multicultural Community Centre (GMCC) is a locally based neighbourhood centre providing information, education, advocacy and connections to clients of diverse ages and cultural backgrounds. According to their vision statement, GMCC is focused on "improving the resilience and wellbeing of those who live, work, learn and play in our community". This vision is pursued through the adoption of an innovative, client focused and strengths-based philosophy to all community development activities and services.



In their 2008 strategic plan, a new emphasis was placed on the need to strengthen the organisation's financial sustainability through the diversification of funding sources. In response, management of GMCC began to actively seek business sector support to supplement the existing funding provided by State and Federal Governments. Having also noticed this desire for new forms of relationships, representatives of a peak non-profit body that had partially funded GMCC's pre-school programs, leveraged their influence to help develop a partnership between GMCC and the Clyde Shell refinery.

The partnership began at a modest scale. A donation was originally provided by Shell Refinery to help the organisation purchase gifts for the yearly Christmas hamper distributed by GMCC to local families doing it tough. In the second year, GMCC's manager, Paula Chegwidan, presented a list of children's names and ages to the refinery and asked for individualised Christmas presents. The staff at Clyde refinery who had appreciated the increased personal touch, followed in the third year by providing personal gifts to local children and assisting with distribution.

Throughout this three year period, Paula noticed that the partnership had resulted in marked levels of engagement and interpersonal relations, not only between the two organisations, but among individual employees and volunteers across the two sectors. Refinery workers had exhibited a strong willingness to give and connect with their local community, evidenced by their increased involvement and enthusiasm. After the third year, GMCC was encouraged to apply for a larger financial grant for a new youth project, to which they were successful.

According to Paula, the relationship between the two organisations has been sustained and strengthened through constant interpersonal contact and high levels of trust (this communication has primarily occurred between the Executive Officer of GMCC and the Communications Manager of the refinery). Furthermore, through continuous engagement and a subsequent "buy in" from refinery staff as a whole, the relationship has twice survived a turnover in Communications Manager, and the restructuring of the refinery into a storage facility.



It is clear that this relationship did not develop naturally. A conscious decision was made by GMCC management to allocate considerable time and energy to the partnership. While overall support has been of a relatively small scale, engagement has been sustained in ways that have not required any dramatic structural change or philosophical shift within GMCC. Management of GMCC have since specifically geared their business engagement toward the local area by canvassing shop owners for donations of goods, time and financial support. Doing so has further enabled GMCC to maintain its focus on building the strengths of vulnerable community members while fostering a stronger civic spirit amongst small business in the area.

Daystar Foundation “Re-Structuring for Corporate Engagement”



Ten years ago, Kingi Williams, a founding member of a locally-based community organisation, attended a conference held in the Blue Mountains on suicide prevention strategies for youth of Polynesian descent. During this conference he ran into an old friend, at which point a discussion ensued regarding the approach and activities of Kingi’s organisation. Kingi explained that his organisation worked to assist youth deemed “at risk” in south west Sydney, by fulfilling basic needs, expanding educational achievement, and building community cohesion alongside three local public schools. Aside from his unpaid role as President, this “micro” organisation consisted of a full-time manager, a part-time community development officer, and a large number of volunteers (consisting mostly of parents of the children attending the local schools).



Kingi’s friend, who had a strong business background, was impressed with the path taken by the organisation, and particularly its focus on the health and education of young people. There was an opportunity for Daystar to attract a corporate supporter. However, it was explained that the organisation faced two major challenges in attracting corporate interest; the language used by the organisation, and its present governance structure. If Daystar was interested in developing corporate partnerships in the future, some major changes were needed. “These are the rules”, Kingi’s friend maintained, and ultimately “whoever has the gold makes the rules”.

After reflecting upon this discussion and deliberating with others in the management committee, the organisation embarked upon a process of “professionalisation”. This process involved a number of strategies.

Firstly, upon his friend’s insistence, the organisation’s name was changed from one previously of Maori dialect, to one that would “stand out and resonate” better within the corporate sector. As such, after some deliberation the organisation was renamed as the Daystar Foundation.

The title of manager was changed to CEO (chief executive officer), and efforts were also made to attract new members into the board of directors, each contributing unique knowledge, professional expertise and contacts.

Another component of this newly adopted “language” involved changing the constitution, and anticipating how Daystar Foundation would be structured in the future.



Although still maintaining its focus on education and youth engagement, the new organisational mission became “creating futures” for at-risk youth, thus emphasising the positive, empowerment oriented focus of the organisation. Daystar sought Deductible Gift Recipient status (DGR), ITEC (Income Tax Exempt Charity) status from the Australian Taxation Office (ATO) and authority to fundraise from the Department of Gaming and Racing NSW. All of these structural features resulted in greater attraction from prospective corporate funders.

Networking and collaboration became core to Daystar's approach. For instance, it was decided that all major activities run through the organisation (aside from the provision of basic needs) would be integrated into the partnering schools' curriculum. Kingi found that in doing so, the activities of Daystar were much more sustainable than if he were to "go it alone".

Furthermore, each major program was run in partnership with another highly respected organisation. Examples include a Literacy Buddies program which linked up school students with workers in Australian law firm Clayton Utz, the Gardening Program which was run in collaboration with the Royal Botanical Gardens Trust, and the Music Program, conducted in partnership with Australian Children's Music Foundation.

Notably, each of these activities was co-managed by "expert" volunteers from each of the partner organisations, who would also undertake evidence-based research and report on the overall outcomes and impact. The gardening program also operates as a social enterprise, whereby proceeds raised from the sale of vegetables are reinvested into the purchasing of further gardening materials.



Daystar also built in a new accountability and transparency system with the help of key professionals on its board who were elected due to their specialist skills (utilising pro-bono support). A New Zealand based accounting system called Xero was installed, which helped create, what Kingi called, a virtual office. This system enabled accountants and auditors to access the organisation's books and financial records remotely at any time. Kingi considered it essential that all people who were involved in the administration of the organisation had access to these accounts. This form of transparency was highly impressive to corporate funders.

Furthermore, even though in most cases donors only required reports at the end of a funding period, Daystar went on the "front foot" by voluntarily providing six monthly reports to all funders. These reports included acquittal of funds, an explanation of the program's progress, testimonials from teachers and volunteers, photographs, and in-depth evaluations of KPIs. These evaluations, which were able to show clear outcomes and measurement of social impact, were carried out by either partnered organisations, or by other professionals working alongside the organisation on a pro-bono basis.



Through these changes to organisational language and structure, Kingi helped entirely transform the organisation to the point where Daystar now boasts sixteen corporate supporters, hundreds of corporate and local community volunteers, all facilitated by two paid staff members.

Despite these changes, conscious efforts are invested in upholding strong connections with local volunteers and those living and working at the grass-roots level. According to Kingi, the work undertaken by Daystar is "seamless" with the local community, while positioning itself as highly professional, transparent and "good value for money" to its corporate partners.



Support

Types of Corporate Support

Types of Corporate Support



Type of Support	Pros	Cons
Financial Transaction	<ul style="list-style-type: none"> Forms a direct cash injection. Particularly beneficial in starting up a new project. Often enables greater creativity and flexibility in service delivery. 	<ul style="list-style-type: none"> Difficulties arise for organisations that do not easily align with a corporation. Corporations tend to prioritise larger, well-branded organisations working in the “marketable” areas of community work. Rarely covers general organisational costs, including wages, rent and other administrative requirements.
In-Kind	<ul style="list-style-type: none"> Access gained to highly valuable goods and services. An effective way to utilise corporate resources and develop relationships without the need for money to change hands. 	<ul style="list-style-type: none"> Reliant on the availability of resource (often left to chance and luck). Engagement can be limited and focused on the short-term.
Volunteering	<ul style="list-style-type: none"> Provision of direct assistance for labour intensive tasks. Presents an opportunity for an organisation to “get a foot in the door” with a corporation, potentially opening up avenues for future engagement. Provides an opportunity to instil the values of civil society and social justice within the corporate sector. 	<ul style="list-style-type: none"> Activities are often resource intensive. Financial donations aimed at offsetting the time and resources expended on corporate volunteering events are becoming less common. Corporate goals can be prioritised over the goals of the community organisation (i.e. emphasising “team building” over assisting the community). Poorly managed volunteer events result in lose-lose outcomes for both parties involved.
Pro Bono	<ul style="list-style-type: none"> Opens up access to much needed skills and expertise not commonly found in the community sector. Potential for short-term assistance to lead into long-term forms of engagement (i.e. through professional secondments). Enables community organisations to develop and present a more “professional” image. 	<ul style="list-style-type: none"> Usually found in areas where the corporation operates, excluding organisations located in outer metropolitan and regional areas. Anxieties around the potential for corporate processes and cultures “colonising” the community organisation.
Cause-Related Marketing	<ul style="list-style-type: none"> Effective in promoting an organisation’s brand. Direct and fast fundraising. Dramatically increases awareness of a social issue, potentially leading to wider social, political and financial support for the organisation or activity. 	<ul style="list-style-type: none"> Tends to emphasise the “business case” for giving, over the specific needs of the community sector. Predominantly used to align with large community sector brands and well-known campaigns (e.g. pink ribbon) or celebrity charity (e.g. Jamie Oliver) rather than unknown, politically contentious or other “unmarketable” social causes.

Financial Donations

It is important to identify the aims and capacity of your NFP organisation before exploring possible sources of financial support. For example, considerable variations in motivations, processes and expectations are found in grant making between corporate trusts, major corporations and local/regional businesses. Trusts and foundations tend to be concerned with broad social goals and expect some form of monitoring by means of social impact assessment in response to their grants. While measurement of this kind may be time and resource intensive for many not-for-profits, the size of these grants can be substantial. In contrast, business support tends to occur at a more modest level, but expectations on internal monitoring and evaluations tend to reflect this reduced scope.

It is also important to clearly plan a grant application ahead of time. Corporate sector funders rarely provide funding to cover organisational costs, preferring instead to support specific projects or activities. As explained earlier, both trusts and corporations provide funding that “aligns” with particular goals and issues deemed important to their institution. Thus, background research enables an organisation to save time and minimise the possibility of a rejected funding application. Creative and innovative projects also tend to receive greater support. For useful insight into the grant-making strategies of 350 Australian trusts and foundations, *The Australian Directory of Philanthropy*⁸ is available for purchase from Philanthropy Australia.

Another factor to consider is the scope of the proposed activity. Unless a business specifies that it targets local “grass-roots” community projects, organisations that are able to address the needs of a larger population or geographical area will be highly competitive. For smaller organisations, it may be preferable to partner with another similar service so as to cover a broader population group through a jointly run activity or program.

⁸ <http://www.philanthropy.org.au/publications/directory.html>

Small and medium-sized businesses operating in your organisation’s geographical area should also be considered when seeking out sponsorship. While local support is usually more modest in terms of monetary value, canvassing local businesses can be an effective way of supplementing your existing revenue streams. This form of business engagement is additionally valuable, as it enables services to build stronger and more sustainable ties with individuals who often live within, and care about the communities in which they operate.

In-Kind Support

Although direct funding is the lifeblood of local community services, it is also useful to note the value of other modes of corporate support. Non-financial or in-kind support can take on many forms, from provision of computers or IT services, subsidies, discounted telephone or electricity usage, donations of furniture, professional staff time or office and meeting space.

Corporate Volunteering

Employee engagement can take on diverse forms. According to Employee Volunteering Program (EVP) Toolkit and Guide published by The Centre for Volunteering⁹, various forms are identified such as [1] regular low level volunteering (2-3 hours per fortnight), [2] individual employee volunteering (e.g. participation on a NFP board), [3] one-off group volunteering events (i.e. non-skilled “team building” days), [4] targeted discrete projects (projects identified by a NFP as a community need), [5] virtual volunteering (web-based or email support) and [6] mentoring.

Strategic consideration is required when contemplating corporate volunteering. Alignment with small or medium-sized volunteer based organisations are becoming increasingly popular to corporations. One-off joint volunteering projects tend to improve staff morale, can

⁹ For a copy of this Toolkit and Guide, as well as other resources on corporate volunteering, visit http://www.volunteering.com.au/tools_and_research/research_reports/EVP_research_report.asp

lead to higher retention rates of the best and brightest workers, as well as hold the potential to better reach consumers. This form provides greater manpower to assist with labour intensive tasks, although some smaller organisations may experience difficulty managing one-off team building events, particularly in light of the time and resources needed to effectively manage larger groups.

Pro Bono

From time to time, organisations require the use of specific professional expertise that is not often found in the community sector. Legal, marketing and accounting skills are becoming increasingly necessary as community groups become more professional and competitive. As a result, many organisations are now investing extensive resources into these highly valued areas. It is useful to note that many law and accounting firms offer these services on a pro bono basis to organisations that meet certain criteria. For example, organisations that assist marginalised groups, alleviate poverty or address certain needs in the community may be eligible to such assistance free of charge.

In the legal profession, many larger firms have a pro bono and community engagement department staffed by partners who organise any links with community organisations. Contacting each of these firms and speaking with a representative is one possible option. Alternatively, referral services are available to help link organisations up with pro bono assistance. Pro Bono Australia¹⁰ has an online professional matching service where organisations are able to advertise pro bono positions.

Cause Related Marketing

The movement toward strategic forms of collaboration has resulted in the development of new support structures designed to benefit both parties. One widespread example of this trend may be found in cause-related marketing.

This activity is typified by corporations donating a percentage of the sale of a particular product to a selected charity. American Express first innovated this process with their cause marketing for the restoration of the Statue of Liberty – in doing so, they recorded a marked increase in credit card sales and were able to cement their unique brand (which has since been closely linked with the New York icon). While this form of community-corporate engagement has been largely focused upon support for large well branded charities, Australian companies such as The Good Guys have, at times, linked their cause-related marketing programs in ways that assisted local coalitions focused upon addressing deeply embedded social issues¹¹.

¹⁰ <http://www.probonoaustralia.com.au/volunteer>

¹¹ The Good Guys store located in Penrith has previously supported a local coalition of NFPs, government and businesses aiming to address homelessness within the Western Sydney region.

Corporate Support Checklist



		Yes	No
	<ul style="list-style-type: none"> • Organisation holds DGR status • Proof of tax status may be presented upon request 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Setting Up the Internal Structures	<ul style="list-style-type: none"> • Organisation mission reflects the strategic objectives for client group or community • The organisation's financial position has been successfully audited and available to prospective funders • Website is professional and lists current projects/activities as well as organisational contacts • Volunteer and public liabilities insurance are current and available 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Preparing an application for corporate support	<ul style="list-style-type: none"> • Research undertaken on prospective funders • Shortlist of potential funders drafted • The potential corporate supporter provides direct funding • Specific needs are highlighted that require redressing • New project or activity has been planned to address the abovementioned needs • The activity or cause aligns with corporate values/ interests • Each corporation that has been shortlisted accepts unsolicited requests • The planned project/activity is innovative • The planned project/activity seeks to engage with corporate employees • The planned project aims to be sustainable 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Further Resources



AICR (n.d.) Community-Business Partnerships Help Sheets: http://www.ourcommunity.com.au/business/view_article.jsp?articleId=3055

The Chamber of Commerce and Industry of Western Australia (Inc.) (2012) Guidelines for Corporate Community Engagement: http://www.cciwa.com/docs/industrial-relations-policy-documents/chco0022_hr_notrims.pdf

Catalyst (2013) Catalyst CSR Dashboard: Community Investment Snapshot: http://www.catalyst.org.au/documents/CSR_Dashboard/CSR_Dashboard_COMMUNITY_INVESTMENT_SNAPSHOT.pdf

Centre for Social Impact: www.csi.edu.au

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O'Keefe and Partners (2013) A snapshot of Corporate Philanthropy in Australia: <http://okp.com.au/australian-corporate-philanthropy-snapshot/>

OurCommunity: www.ourcommunity.com.au

Philanthropy Australia: www.philanthropy.org.au

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Volunteering Australia (2011) Volunteers Vital Pack: summary of insurance cover for charitable, not for profit, voluntary organisations & organisations that involve volunteers: http://www.volunteeringaustralia.org/files/ZB6IGPXSC9/AON_Volunteers_Vital_Pack_A5_13_02_12.pdf

Western Sydney Community Forum: <http://wscf.org.au/resources/community-corporate-relations>

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