



Building a movement for good: a practical guide for charities and businesses





Introduction

At Ecclesiastical we believe business should be a force for good. In these challenging times, as charities struggle to cope with the impact of coronavirus, we think this is more important than ever. Owned by a charity, we're a successful commercial company with a unique purpose. We make profits so that we can contribute to the greater good of society.

Our structure is unusual, but we think all businesses can adopt this philosophy to some degree. Supporting charities and communities is one fundamental way to do it.

That's why we launched our Movement for Good awards. Through it we give to a huge range of causes, providing a donation which can spark further support from others. But even more than that, we want to provide a platform that helps bring together charities and businesses.

Our research shows three in five (62%) charities in the UK do not currently have a corporate partner, yet two-thirds (67%) agree that working with business is essential for their future.

By sharing advice and best practice, we hope charities can maximise the benefits of working with a corporate partner, which we believe is crucial in the current crisis.

The Movement for Good roundtable

As part of that goal, in late 2019 Ecclesiastical invited beneficiaries of the Movement for Good awards to London for a roundtable discussion on how charities can better engage with business.

Chaired by Linda Minnis, CEO of Charities Trust, the meeting provided fascinating insights into the day-to-day work of charity teams as they attempt to find and nurture corporate partnerships, and manage (or occasionally fail to manage) the diverse expectations of partner businesses.

Most of them had already worked with corporate partners and were well versed in the trials and triumphs of engaging businesses with their work.

What came out of a lively discussion was a set of warts-and-all insights into the reality of working with business partners. One thing quickly became clear. There is no one-size-fits-all model of corporate engagement. Money and volunteers are the lifeblood of local charities, and generous businesses provide them in spades (though sometimes with too many actual spades, as we explain later), but the quality of engagement differs enormously.



It was an inspiring session and we were determined that this knowledge and experience wouldn't stay in the room. We also surveyed 115 UK charities to get a deeper understanding of some of the issues raised during the roundtable. The result is this report, which we hope will go some way towards bringing charities and businesses closer, at a time when we all need to work together.

**Chris Pitt, Corporate Responsibility
Manager, Ecclesiastical Insurance**



Building meaningful partnerships

From box ticking to partnerships

Some companies still regard charity engagement as little more than a CSR box-ticking exercise, providing an annual cheque or volunteer day and little else. Attempts to forge deeper, more meaningful relationships are met with a cold shoulder.

And while no charity turns up its nose at an annual cash injection, the box-ticking approach can sometimes be counter-productive, especially when it comes to volunteers. What to do with small armies of corporate volunteers that turn up for a day and vanish just as quickly was a recurring theme of the discussion.

At the other end of the spectrum, some businesses fully engage with a charity's aims and vision, and become partners in the true sense of the word. Those companies are rewarded with a full range of benefits, including PR and team-bonding opportunities and access to the real local knowledge that charities - with well-established links to local communities - can provide. Many of the experiences discussed around the table were somewhere between those extremes.

Setting expectations

With that in mind, setting expectations was a key theme of the discussion. For a partnership to be successful, everyone has to be on the same page from the start. Charities that know exactly what they want from business spend less of their valuable time on wild corporate goose chases, because they limit nurture activity to those firms that seem the best fit with their aims and vision.

And keeping their vision in mind helps charities resist pressure to fit in with anything a business wants simply to secure a donation. Our survey found one in five (21%) charities have felt under pressure to agree to a request from a partner in return for funding. As attendees testified, businesses can make requests that are inappropriate or simply impractical, given a charity's resources. One attendee put it best when she said: "If it doesn't feel right, it's OK to say no." Charities should set limits and expectations early in the relationship.

Due diligence on potential partners is also vital, though the difference between an appropriate and inappropriate corporate sponsor is not always obvious. For example, should a charity that promotes reading to children partner with a fast food chain accused of contributing to childhood obesity? It's not a simple decision. Where are difficult to reach children most likely to see and respond to the charity's material?



Time and effort

It was also evident from the discussion that finding a corporate partner was the start of the real work rather than the end. Management of the relationship is vital. Charities without a clear strategy may be left with partnerships that are difficult to justify. They get locked into relationships with businesses that harbour unrealistic expectations or need hand holding through the process.

For example, business partners often assume that charities always need extra bodies. In some cases that might be true, but without careful planning volunteer days can be a drain on precious resources. In fact our survey found that one in ten (10%) charities believe company volunteering days are not at all useful for their charity while two in five (42%) don't offer company volunteering days at all. As one attendee put it: "How many times do we need the toilet wall painting or a flower bed dug?"

The fact is, some charities are more than happy with a gang of volunteers prepared to dig holes, paint walls, or shift furniture, and some aren't. What everyone needs is an honest conversation at the start of the process about what is and isn't useful. Good causes benefit most when volunteering adds real value to a charity's work, whatever that volunteering entails.

Even when a strategy is in place, managing corporate partnerships requires time and effort. Good partnerships are a two way street, with charities offering their corporate partners as much as they receive in return. Charities have a huge amount to offer the right corporate partners, from the obvious - PR opportunities - to less tangible benefits, like creativity, expertise and a real connection to customers and communities. They shouldn't be shy about advertising these commercial advantages.

Where to start?

Which all begs the question: how do you find the good guys? Or in the case of small charities, how do you find time to nurture relationships with corporate partners at all? Many charities struggle with cold calling, for the simple reason that they don't know who to speak to.

Sometimes the simplest solutions are the best. Having a coffee with a local business person is often less intimidating and more valuable than parroting a pre-prepared spiel over the phone. Asking your board and current donors to introduce you to five contacts each is a great way to widen your potential pool of partners, with the added advantage that initial contact comes by way of a trusted third party.

Businesses can help here. Good partners might open up their own networks to the charities they support, or even help facilitate networking events. The vast majority of charities we surveyed (78%) agreed businesses should help to facilitate networking events for charities.

And previous advice to charities applies equally to business. Know what you want from a partnership, and be prepared to work with a charity to create real value for both parties.

From a corporate point of view, that will happen more naturally when you partner with a cause your employees feel passionate about. So ask them to nominate their own preferred charities, or ones they have a personal connection with. Leaving the choice of charity partner to the HR or CSR manager is a missed opportunity.

Better partnerships evolve when employees are actively involved. An annual cheque and well-planned volunteer day are always appreciated by hard-pressed charities, but





real value from the relationship comes from deeper engagement, and that often starts with enthusiastic, committed employees.

If there was an overarching message from the discussion, the benefit of real engagement was undoubtedly it. A real partnership has the

potential to bring real business benefits and make a huge difference to a charity's work. With that in mind, here's our four stage guide for charities and businesses that want to get the most from working together.





The four stages of success

Stage 1

No more cold calling: how to find corporate supporters

How do you find corporate sponsors? The obvious answer is that you ring them up. But many charities find cold calling difficult and this is perhaps why only one in five (21%) of the charities we surveyed had successfully approached their current corporate partner by cold calling. Doing it well requires the kind of time, resources and sales expertise that many charities don't have.

“We get offered volunteering but no money. Many companies don't have a CSR team, and cold calling is difficult. How do you even know who to speak to?”

Caroline Stevens, CEO, The Footprints Project

Instead, exploit the contacts you already have. Ask board members and major donors to introduce you to potential partners. Some won't open their contact books to you, but others might. In fact, ask everyone, including your staff and volunteers (you never know who someone might know). Will current supporters help facilitate networking events with customers or clients on your behalf? Can you speak at corporate events or take a stand at an annual conference?

Of those surveyed, half (48%) had successfully approached their corporate partner through personal networks, while a quarter (23%) had approached them at a networking event.

“We set up a group of influential people among current supporters who can open up networks for us. They meet four or five times a year and, because they are already engaged with our work, they are happy to introduce us to their own contacts. But it's not just influential people. You never know who a person might be connected to. Have you asked your staff and volunteers about their connections?”

Tom Robertshaw, Fundraising Manager, Candlelighters Trust

And when you do meet corporate contacts, don't just make a sales pitch. Nurture the relationship. Learn about the business and its priorities. Explore possibilities for collaboration.

Use the power of the magic bean if you have to. “Ask people out for a coffee,” says Julie Jones of Children's Books Ireland. “It's much easier to explain your mission and values face to face, and it's friendlier than doing it on the phone. Trust me, those coffees convert! You can start to build real relationships that lead to the right kind of partnerships.”



Stage 2

Going beyond an annual cheque: how to find better partners

Finding corporate partners is one thing. Finding partners whose commitment goes beyond the most basic - like handing over the proceeds of the staff sports day - is another. Focus your efforts on those companies who share similar values, and where there are obvious synergies of purpose or approach.

Businesses won't necessarily see those synergies themselves, so be prepared to tease them out. Research prospective partners (LinkedIn can be invaluable), get to know the people you are dealing with (remember the coffee), and help them see the benefits of your partnership.

“We worked with KPMG on a volunteering scheme to celebrate the centenary of women’s suffrage in Ireland knowing that it would chime with the company’s equality agenda. The programme worked brilliantly for us, with KPMG volunteers leading workshops on the theme of Bold Girls, based around a reading guide we produced on books by and about women. And it also worked for KPMG, reinforcing their values and skills-based volunteering programme.”

Elaina Ryan, CEO, Children’s Books Ireland

It goes without saying that you shouldn’t risk your reputation in pursuit of a cheque, however eye watering the amount.

Sometimes partnership requests are obviously inappropriate - animal charity Give a Dog a Bone recently rejected sponsorship from an animal testing company - but not always. Children’s Books Ireland wrestled with a decision about whether to promote books in a supermarket chain. Their mission - to encourage reading as widely as possible - clashed with the risk of alienating traditional supporters among independent bookshops.



Some decisions are difficult, but if you have a clear ethical policy, conduct due diligence, and refuse to do anything you’re uncomfortable with, you’ll get most of them right. Set expectations and boundaries early - ideally at the first meeting with a potential partner - and don’t be afraid to say no.



“We really value the contribution that corporates can make. However the relationship between a corporate and a charity can be most effective if, instead of either one imposing prescribed demands or ideas, it acknowledges and makes use of the skills and expertise of both. We have learnt the importance of matching needs, skills and aims. We see that a relationship between a corporate and a charity has a much better chance of being meaningful and long lasting if it is mutually beneficial.”

Louise Gore, Project Manager, The Jericho Foundation

Finally, know what you want from a partnership, and make sure it will be truly beneficial. Many charities find it easier to attract businesses who simply expect to provide an annual cheque or send volunteers than those who want deeper engagement.

No charity will turn up its nose at money and volunteers. But volunteers can be tricky to accommodate - more on that later - and an annual cheque, while always welcome, has to be viewed in the context of value. How much effort is required to manage the relationship? Might it be better expended elsewhere?

Be aware that if you accept volunteers, you have to accept their desire to truly contribute. Plan ahead, give them something meaningful

to do, and explain why it matters. If volunteers feel like a burden, they'll return to the office wondering (out loud) why they bothered. But give them a positive experience and they become enthusiastic ambassadors for your cause, spreading the feel-good factor through their workplaces and beyond.

Viewed in that light, even simple, box-ticking corporate exercises can offer more in the long run. Of course, all financial contributions are welcome if they require little effort beyond an annual thank you email and photo opportunity. But many charities find that the annual volunteer day can lead to a deeper relationship, given time and effort. It's up to you to pursue those possibilities, inspire partners with your vision, and outline the benefits of a deeper engagement in terms they understand.





Stage 3

No more toilet walls! Managing corporate relationships

There are few quick wins when it comes to corporate partnerships. Developing deeper relationships can take time. Give a Dog a Bone chief executive Louise Russell says finding good corporate partners was a six year journey: "Some people start with good intentions but life and business gets in the way and they can't commit long term."

But some charities find that tapping into benefits beyond the annual cheque is just a question of working out what you need from a business and asking for it. For example, if you're overwhelmed with volunteers, can a partner offer something else? Think furniture, the occasional use of a meeting room, accounting help, surplus IT equipment or marketing resources, among many other possibilities.

"We manage a 100,000 sq ft building in Edinburgh. The building was empty, so it was a win-win for us and the building owner. We have space to operate from and the building gets looked after."

**Glenn Liddall, Chief Executive,
People Know How**

Charities must be proactive about communicating their needs to corporate partners. Businesses may send an army of volunteers armed with paint brushes and shovels your way in good faith, assuming you

need brawn more than brain. But could those volunteers be put to better use?

"As charities, we have to be prepared to ask for what we want. Instead of having a professional person come and paint the toilet wall or whatever, ask your partner if they'll lend you a HR consultant - to work as a HR consultant! After all, many of us can't afford to pay for one. That's very valuable volunteering."

Elaina Ryan, CEO, Children's Books Ireland

Three in five (61%) of the people we surveyed said their charity would benefit from more skills based volunteering. So why not ask to utilise the professional skills of volunteers? Could IT experts sort out your internal network? Do you need help with cold calling from sales professionals, or inspiration for a marketing campaign from professional marketers?

All this may require negotiation with your corporate partner, who might have sold volunteering to staff as both a useful contribution to the community and a break from day-to-day roles. It may also take more planning on your part, because resolving an IT issue may not be as straightforward or obviously time-limited as a day of painting walls. And ultimately, corporate employees might refuse the offer of a busman's holiday.



At the same time, working away from the office, for a good cause, and without everyday pressures and targets can still be inspiring for corporate volunteers, even in positions that utilise their professional skills. Young people at the start of their careers can bring valuable skills to charities, and will appreciate your endorsement on their CVs.

And once again, encouraging a more engaged volunteering model may foreshadow deeper corporate engagement, as volunteers return to their offices and enthuse about your work.

Of course, the more a business contributes, the more it may reasonably expect in return. Again, you should refuse any request that compromises your vision or purpose. It can't be emphasised enough how important it is to set expectations and limits early in any

relationship, and stick to your guns regardless of the rewards on offer. Nothing is worth tarnishing your reputation for.

“The charity I used to work for - a breast cancer charity - struggled to find corporate partners. At Candlelighters we have the opposite problem. There are too many requests and corporate expectations can be challenging. For example, we get requests from partners to visit the children's ward, and it's just not appropriate.”

**Tom Robertshaw, Fundraising Manager,
Candlelighters Trust**





Stage 4

Much more than good PR: what charities do for business

Charities want corporate partners, but more than that they want the right corporate partners. They want money, but also a deeper relationship that provides long term value. They want volunteers, but professional skills are often more valuable than free manual labour. They want corporates to limit their expectations, and accept both a charity's restricted resources and its strict ethical code.

So what can businesses expect in return?

In a word, a great deal. Of course, charity partnerships offer an association with a good cause, and the PR opportunities that come with it. But these days they offer so much more besides, and more businesses know it.

“There has been a shift in recent years. Companies want more from working with charities than just a mention at the annual meeting. They want positive publicity. They want to get staff involved because it's a great team bonding opportunity. They want connections to the community that charities can offer. We need to start thinking of it as more of a B2B partnership than generous corporate benefactor and grateful charity.”

**Tom Robertshaw, Fundraising Manager,
Candlelighters Trust**



There's a growing body of evidence that modern workers - and especially millennials and the generations that followed - want to work for socially responsible businesses that mirror their values.

With that in mind, charity partnerships can play a key role in a company's recruitment and retention strategy. By humanising a company they provide real value, because top talent is in high demand and replacing experienced staff is expensive and disruptive.

Charities also have deep roots in local communities, and charity leaders are experts in creating and nurturing those connections. Their insights into the needs of the community can be invaluable, helping guide businesses as they develop new products and services, and giving them a better understanding of the people they sell to, and the people they employ.

As Jane Dyer, fundraising and marketing manager of Gloucestershire Young Carers, says: “When companies engage with us we hope it leads to a deeper understanding of the people in their community, their lives, the challenges



they face and their needs. A positive outcome of that relationship is that companies not only apply this understanding to their customer base but perhaps to their own staff and their families too.”

A charity partnership can help to give national or international corporations a local and human face. People Know How is well connected with the academic community in Edinburgh, giving one corporate partner - a student accommodation company - a positive local link to its customer base.

“We have our messaging in the biggest Sainsbury’s store in Scotland, which is wonderful exposure for us. It works for them too because we are a connection to the local community.”

Louise Russell, Chief Executive, Give a Dog a Bone

Customers are also becoming more discerning. Like employees, they like to connect with companies with a social conscience. But they will quickly see through shallow and cynical marketing stunts.

When Mastercard partnered with the World Food Programme and promised to give 10,000 meals to hungry children for every goal scored by Messi or Neymar at the 2018 World Cup, social media erupted in fury. Many consumers balked at the sight of a multinational company using the lives of starving children as the basis for a cheap marketing campaign.

Most charities won’t have Mastercard on speed dial, but for both businesses and charities the lesson is clear. Everybody benefits from partnerships that go deeper than simply trading volunteers and money for PR opportunities. When businesses become committed supporters of a cause, and charities act as valuable sources of local intelligence and fresh perspectives, everybody stands to gain.





Five tips for charities

- Don't rely on cold calling businesses. Use your connections to widen your network, and develop a caffeine habit.
- Focus resources on nurturing companies who share your values, and with whom there are obvious synergies.
- Have a vision, strategy and ethical code that you stick to, regardless of the rewards on offer. Use them to set expectations at the start of any corporate relationship.
- Ask for what you need. If you don't need volunteers with spades and paintbrushes, but do need volunteers with bookkeeping skills, say so.
- Even the shallowest relationship has the potential to develop. Show what you can do for the company. Get to know the people that matter. Present them with ideas that have value for you both.

Five tips for businesses

- If you only want to send a cheque or volunteers that's fine. But listen to what your partner wants, especially in terms of the work your volunteering staff might do.
- Respect the charity's boundaries. Understand that you may be working with a charity with very limited resources and a strict ethical code (around access to vulnerable people, for instance).
- Think about adding value to the relationship. Do you have a spare meeting room they could use, an unused office, or some perfectly decent laptops that you've replaced with newer models?
- Understand that if you want to enjoy all the benefits that a charity partnership can bring, of which there are many, you will need to engage more deeply. Meet your partner regularly, work out where your needs and values coincide, and develop strategies accordingly.
- Can you help them spread the word, or find other sponsors and supporters? Introduce your partner to your business network. Give them space at your annual conference or in your email newsletter.



