Corporate Fundraising

With corporate partnerships achieving a higher-than-ever profile and with increasing numbers of charity and corporate players entering the stage, there has never been a more important time to be developing leading-edge strategies and following best practice.

Successful partnerships with companies can lead to significant financial and non-financial benefits for charities, and learning from the experiences of others is a key way to maximise potential and avoid pitfalls.

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- the historical context and future direction of corporate partnerships
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- managing and evaluating corporate relationships
- the evolving field of corporate fundraising ethics
- practical information and templates on legal issues, strategies and policies.

This book will provide food for thought and an essential context for anyone involved in the field of corporate fundraising.

‘Providing a powerful insight into the emerging trends in corporate giving, this book is not only for those making a tentative first step in this area but also for those who have significant experience. All corporate fundraising teams should read, discuss and act on the contents.’

Sandra Osborne, Group Director External Affairs, Sense
Corporate Fundraising

Editor: Valerie Morton

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The trouble with change is that it never stands still! And that is no less true for fundraising than any other professional discipline. The economy, political landscape and the ways people exchange information and communicate with each other all impact on the way in which charities ask for and raise money. That is what makes fundraising such a challenging and dynamic profession. I am not sure I will be popular for comparing fundraising to dabbling in stock market futures, but successful fundraisers are often those who can predict and be responsive to social change and be able to adapt their fundraising strategies accordingly – to be effective it is vital to stay ahead of the game.

The Directory of Social Change's Fundraising Series seeks to address the full range of fundraising activity and techniques in one series. Each successive volume aims to address one key element in the spectrum of fundraising techniques. As fundraising techniques evolve and develop, new titles in the series are added to and old ones revised.

The titles are intended as texts that encourage and debate fundraising within a professional framework: written and used by academics and practitioners alike. Each title seeks to explore a fundraising activity within its historical, ethical and theoretical context, relate it to current fundraising practice as well as guide future strategy.

We thank all those who have contributed and continue to contribute to the most comprehensive fundraising series available today.

Debra Allcock Tyler, Chief Executive
Directory of Social Change
About the authors

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Alison Braybrooks is Managing Director of Impact abc, a consultancy that helps companies to manage their social impact. She has worked in sustainability for over 20 years, with 10 years in the voluntary sector, followed by heading up EDF Energy’s community programme, then as Director of LBG (London Benchmarking Group), where she led the group to focus on impact measurement.

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Rachel Billsberry-Grass works as a fundraising and management consultant. Her consultancy, Causeworks, offers strategic and practical advice and training to a wide range of voluntary organisations as well as corporate responsibility advice for companies.

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Beth Courtier

Beth Courtier has worked at BT for some 20 years, undertaking a variety of work including HR, training, work with the further education and higher education sectors and sponsorship. For the last 15 years Beth has managed different Community Investment programmes, including, most recently, BT’s charity and employee engagement activities.

Beth is committed to embedding BT’s charity activities across the business. She is committed to delivering business benefits and developing innovative, replicable and sustainable initiatives for charities. She leverages in-kind support in addition to the company’s financial investment; she has also leveraged additional funds working with suppliers, other partners and through lobbying government.

Beth has contributed to numerous publications and spoken at events across the world. She has won corporate responsibility, cause-related marketing, marketing, public relations, brand and reputation and innovation awards as well as charity sector awards. Beth is a Clarion Awards industry champion, has received a ChildLine Patron Award and is an Honorary Member of Council for the NSPCC.

Martin Croft

Martin Croft is Head of Communications for the Institute of Promotional Marketing and also writes for various publications on marketing and branding. He spent 20 years associated with Marketing Week magazine, and has written for a range of business titles and national newspapers, including The Times, The Telegraph, The Guardian, The Scotsman and The Observer. He has also worked for the Institute of Chartered Accountancy and the Institute of Direct Marketing.

Michael Fairclough

Michael Fairclough took up the post of Head of Community and Co-operative Investment at The Co-operative in October 2007, following an amalgamation with United Co-operatives where he previously worked. The newly combined business has a turnover of over £14 billion and employs 110,000 staff. His responsibilities include developing and maintaining a community investment framework, overseeing the strategic development and delivery of the Group’s community programmes and co-ordinating support for the co-operative sector.

Prior to this, Michael worked for the international development agency, Christian Aid, in a campaigning and adult education role. Most of his early career was spent working in and with communities across North West England.
Amy Franklin
Amy Franklin developed a keen interest in fundraising whilst studying at the University of Warwick. Graduating with an honours degree in law, Amy began her career at Tommy’s, the baby charity. At this small but ambitious charity she worked on a diverse range of accounts and special events. Amy has managed the corporate accounts team at Alzheimer’s Society since 2008. Leading on high-profile Charity of the Year accounts with companies such as KPMG, Credit Suisse and Tesco, Amy has successfully steered her team through a time of intense change and growth.
After university Amy worked in an orphanage in Ghana, which she has continued to support and visit every year since.

Ruth Freeman
Ruth Freeman started her fundraising career in 1984 as a House to House Coordinator for Barnardo’s and has remained in the charity sector ever since. Ruth developed experience across a wide range of fundraising disciplines, including workplace giving, which is where her interest in payroll giving began.

After four years and with over 200 successful payroll campaigns under her belt, Ruth was promoted to National Marketing Manager for Workplace Giving where her work on payroll giving resulted in a new workplace payroll giving strategy for the charity. In 2005 in a combined role as Head of Partnerships at Barnardo’s, Ruth shared her passion for creativity in payroll giving by jointly presenting Creative Campaigns at the Institute of Fundraising conference.

From 2006 Ruth has been Director of Income Generation and Marketing for the Myton Hospices working across Coventry and Warwickshire . . . needless to say, they now do payroll giving.

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Mathew Iredale is a freelance prospect researcher and founder of The Prospect Research Toolkit, the first website specifically designed to provide in-depth information and support to prospect researchers in the UK. For six years he was Fundraising Research Manager at the Stroke Association and prior to this he was Prospect Research Manager at Great Ormond Street Hospital Children’s Charity and a high value donor fundraiser at Imperial Cancer Research Fund. He has been on the committee of Researchers in Fundraising since 2006 and was chairman from December 2007 to December 2009. He has twice spoken at the Institute of Fundraising’s National Convention and co-presented the CASE Prospect Research Seminar in 2008.

Alice Jackson
Alice Jackson started her career in the private sector and spent five years working for a young consultancy. She progressed through the sales team and worked with a number of blue chip organisations, selling in and managing large-scale learning solutions. Alice joined the Alzheimer’s Society in 2009 as head of their new business corporate fundraising team. She successfully created winning pitches and negotiated major corporate partners, helping to double corporate income in one year. Currently, Alice is Head of Corporate Fundraising at Sue Ryder.

Ian MacQuillin
Ian MacQuillin is head of communications at the Public Fundraising Regulatory Association (PFRA). Prior to joining the PFRA in June 2009, he had been an account director at fundraising public relations specialist TurnerPR, working with leading fundraising suppliers and charities. A journalist for most of his career, Ian was editor of *Professional Fundraising* (PF) between 2001 and 2005.

Ian blogs on UK Fundraising and has presented regularly at fundraising conferences on subjects including charity/media relations, fundraising
ethics and F2F fundraising. He is a guest lecturer for the on MSc in Management in Civil Society (Marketing and Fundraising) at London South Bank University.

**Valerie Morton**

Valerie Morton is a lifelong fundraiser, in both her professional life and her personal life. She has held senior management roles in charities including Help the Aged, NSPCC and RNIB and is also a trustee of Central YMCA and her local almshouse charity. Her charity sector involvement is complemented by her role as a Non-Executive Director in the NHS. Valerie's passion for corporate fundraising was ignited at the NSPCC in the days when the Charity of the Year concept was in its infancy and the payroll giving scheme was about to be launched. Now a fundraising and management consultant, Valerie's work includes advising and supporting charities and companies on how to maximise the benefits of partnerships and on developing and running training courses to fulfil her commitment to best practice in the sector.

**Edwin Mutton**

From 1965 until 1980, Edwin Mutton ran his own wholesale distribution business. In 1980, he joined Kimberly Clark Ltd, the manufacturers of Andrex and Kleenex products, and was Trade Promotions Manager, Sales Promotions Manager and finally Sponsorship Manager.

In 2000, he joined the Institute of Sales Promotion (now the Institute of Promotional Marketing) and from 2001 to 2007 was its Director General. Now semi-retired, he heads the IPM's compliance function and runs its Awards programme. He is a member of the Committee of Advertising Practice (CAP), which draws up the CAP Code, the rules which UK advertising and marketing must follow.

**Andrew Peel**

Andrew Peel is a freelance fundraiser and consultant with 19 years’ experience in the charity sector. He has led corporate fundraising teams at Sightsavers, the British Red Cross and Help the Aged and as a consultant has worked with a wide range of organisations including Guide Dogs for the Blind, Diabetes UK, the RNLI, the British Heart Foundation and Maggie’s Cancer Caring Centres.

He specialises in interim management, strategic planning, mentoring and in delivering impactful corporate fundraising proposals, pitches, campaigns and strategies for clients.

A member of the Institute of Fundraising, Andrew won its Professional Fundraiser of the Year Award in 1997.
Anne-Marie Piper
Anne-Marie is a partner at the law firm Farrer & Co, where she heads the Charities Group. Her job involves acting for sponsors of new charities, directors, trustees and officers of existing charities and other not-for-profit bodies, as well as individuals and companies wishing to make charitable gifts or do business with charities. She is also well known for her expertise in charity fundraising law and also for her handling of Charity Commission investigations and complex mergers and reorganisations of charities and their subsidiary and related entities. Founder, former secretary and chairman of the Charity Law Association, Anne-Marie also lectures and writes regularly on charity law subjects.

Simon Sheehan
Simon Sheehan joined as Director of the Hilton in the Community Foundation in 2004. Since then the Foundation has almost tripled its grant-giving, quadrupled its fundraising and expanded its work from two to 26 countries across Europe.

Prior to joining, Simon was the Communications and Fundraising Manager for the Aga Khan Foundation (UK). His work included community fundraising, inter-government and government communications, and filming in Afghanistan, Tajikistan and Pakistan. Simon’s previous roles included working for the International Crisis Group, an independent research and advocacy body working in Bosnia, Sierra Leone and the Great Lakes region of Africa. Simon has a BA in Zoology and Botany from Reading University.

Anne Shinkwin
Anne Shinkwin is a fundraising consultant with many years of experience working in fundraising and the private sector. Most recently Anne was Head of Corporate Partnerships at UNICEF UK for five years (2005–10) building the team and doubling income in four years. Prior to this, Anne worked at the British Red Cross for two and a half years managing key corporate partners such as Tesco, Barclays and GlaxoSmithKline and securing new business opportunities such as Blue Peter and Deutsche Bank Charity of the Year. Anne started her career working in the private sector for Kimberly-Clark as European Research & Development Project Manager.
Claire Wilson
Claire Wilson worked in the charity sector for 20 years, starting her career as Sponsorship Manager at the Prince’s Trust.

As a Director of strategic fundraising consultancy Cooper Wilson, Claire worked with a broad range of clients from business and not-for-profit, advising on corporate cause partnerships and implementing fundraising strategies.

Claire was a strong advocate of sharing and driving forward best practice. Her vision was for charities to be able to take their rightful place on the world’s stage and to achieve lasting social impact.

Alix Wooding
Alix Wooding has been working with corporate supporters and sponsors for the past decade. Since 2005 she has been growing the corporate fundraising team and income at Alzheimer’s Society, where Alix has been involved in delivering new business and in overseeing the growth and development of the corporate partnerships strategy. During this time the team has won and delivered significant partnerships with KPMG, Bupa and Tesco.

Prior to this she worked at public relations agency Lexis PR, engaging companies in sponsorship of public sector projects, including international ministerial conferences. Before this she worked to engage companies in education initiatives on behalf of the Department for Education and Skills.
About the Directory of Social Change

DSC has a vision of an independent voluntary sector at the heart of social change. The activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to help these organisations and the people who support them to achieve their goals.

We do this by:

- providing practical tools that organisations and activists need, including online and printed publications, training courses, and conferences on a huge range of topics
- acting as a ‘concerned citizen’ in public policy debates, often on behalf of smaller charities, voluntary organisations and community groups
- leading campaigns and stimulating debate on key policy issues that affect those groups
- carrying out research and providing information to influence policymakers.

DSC is the leading provider of information and training for the voluntary sector and publishes an extensive range of guides and handbooks covering subjects such as fundraising, management, communication, finance and law. We have a range of subscription-based websites containing a wealth of information on funding from trusts, companies and government sources. We run more than 300 training courses each year, including bespoke in-house training provided at the client’s location. DSC conferences, many of which run on an annual basis, include the Charity Management Conference, the Charity Accountants’ Conference and the Charity Law Conference. DSC’s major annual event is Charityfair, which provides low-cost training on a wide variety of subjects.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk, call 08450 777707 or email publications@dsc.org.uk
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Further, we are grateful to the following people for their various contributions to this title: Romana Abdin, Andrew Ball, Beth Breeze, Kate Duggan, Celine Gomez, Jamie Grier, Sarah Kluter, Mark Line, Linda Main, Paul Morrish, Ben Savage and Adrian Sargeant.
Corporate fundraising has really come of age in the past ten years and now presents charities with fantastic opportunities to build and develop mutually beneficial long-term partnerships within the corporate sector.

Undoubtedly the most exciting relationships change in shape, style and structure throughout their term and, to support their development, it is vital to fully understand your partner’s motivations and objectives, ensuring the best result is achieved through your partnership. When managed successfully, great partnerships should deliver huge benefits not only to both parties but also, and most importantly, to your beneficiaries.

Many charities are starting to focus more time and resources on building strong and ambitious teams within this area of fundraising, so it is very timely to launch the revised and updated edition of Corporate Fundraising. There have been some really innovative achievements and developments within corporate fundraising over the past few years and, by sharing experience and best practice across the sector, we can help each other to continue to grow this exciting area of fundraising.

Tanya Steele, Director of Fundraising
Save the Children (April 2012)
Introduction

Thirteen years have elapsed since the first edition of *Corporate Fundraising* was published in 1999, so now would seem to be a good time to look back over the previous editions, compare them with this latest fourth edition and see what has changed in the world of corporate fundraising.

Firstly, let’s look at the statistics. In the year 1996/1997 Charities Aid Foundation stated the value of corporate donations from the top 500 companies at £305.6 million (Pharoah 1998). Similar research in 2009/10 shows the top 574 companies giving £512 million with a further £250 million of in-kind support (Lillya 2011, p. xvii). Taking the donations alone and without even allowing for the difference in company numbers the increase is only marginally above 3% a year compounded.

Instinctively this figure seems very odd. Whereas some years ago it would be difficult to find examples of product promotions, research at the time of writing came up with a range of examples including, interestingly, a building society canvassing views of customers about a potential savings account which would donate a percentage of the interest to charities. Charity of the Year partnerships, whilst admittedly common in 1997, are now considered the norm for well-known companies and regularly found in small and medium enterprises too. Local papers are full of companies – architects, solicitors, estate agents and the like – proudly showing off their latest golf day or charity ball for their adopted charity.

The *C&E Corporate–NGO Partnerships Barometer 2011* indicates that there is a growing trend towards strategic partnerships between companies and charities – a theme reflected in the case studies from the Co-operative in Chapter 17 – and also that businesses (88%) and NGOs (93%) expect the role of cross-sector partnerships to become much more important to their organisations over the next three years (C&E 2011, p. 5). It will be interesting to follow up on this prediction in future editions of this book.

A theme which I anticipate will be subject to much discussion during the life of this book is that of the pitching process which accompanies many charity–corporate partnerships. Although there have been moves to ensure such processes are open, transparent and equitable, there is still concern about whether companies appreciate the true impact their processes have on charities.
One thing that remains a constant is the need for corporate fundraisers to have a commitment to following best practice. At the time the third edition of this book was being published in 2007, the Fundraising Standards Board (FRSB) was being launched to the public. Not only has this reinforced amongst fundraisers the need to follow the Institute of Fundraising Codes of Practice but, as corporate fundraising so often has a very public face, the efforts of the FRSB to encourage public trust and confidence in charities will benefit this area of fundraising.

The structure of this edition has been refreshed. In addition to four case study chapters, most individual chapters include case studies to illustrate that chapter topic. I am delighted that some of the most respected and talented people involved in the world of corporate fundraising have given freely of their time to contribute to this book and I also appreciate the contributions from authors who have provided examples from the corporate perspective and those whose professional experience offers valuable guidance to readers.

Valerie Morton

References


Changes in the Institute of Fundraising’s Codes

Please note that a new Code of Fundraising Practice will be launched during 2012, in which the standards and legal compliance aspects of the various codes are pulled into one document. The best practice elements of the codes will remain in separate guidance documents. The new Code will be in HTML format and easily accessible from the Institute’s website. Current codes which are referred to in this book, such as Charities Working with Business, will be still identifiable within the new merged Code and also within the separate best practice guidance documents.
Dedication

This book is in memory of
Claire Wilson
1961–2012
A dedicated corporate fundraising professional
Inspiring and full of joy
CHAPTER ONE

Corporate community partnerships: history, evolution and future

Claire Wilson

Introduction

In 1887, Lever Brothers ran what is believed to be one of the earliest recorded cause-related marketing campaigns in the UK. Archives from the Royal National Lifeboat Institution show an engraving of Sunlight No. 1 lifeboat (featured in The Illustrated London News, 10 October 1889; see fig. 1.1), which was donated by Lever Brothers in 1887. Llandudno Lifeboat station reports that Lever Brothers ‘ran a special competition to fund the new lifeboats’ (Llandudno Lifeboat n.d.).

Fast forward to 2011, and the most admired corporate cause partnership as voted by companies and non-governmental organisations in the C&E Corporate–NGO Partnerships Barometer 2011 report was for a cause-related marketing programme run by Oxfam and Marks and Spencer. This programme included the simple concept of revitalising Oxfam’s falling shop donations by giving an M&S money-off voucher in exchange for donating second-hand M&S clothes.

This was a highly effective idea which was rewarding for all. It has empowered consumers, shop staff and management from both organisations and has been a success in terms of heightened reputation for the company and new income generation for the charity. The partnership involves both organisations ‘sharing knowledge and working together to drive sustainable production and consumption’, not forgetting the obvious bottom line of shared financial gain. Pampers’ (Procter & Gamble) work with UNICEF to provide maternal and infant tetanus shots in less-developed countries was the second most admired partnership and Sainsbury’s partnership with Comic Relief won third place. The report states:

Partnership professionals rate these as the most admired partnerships because of their ambition, scale, ability to innovate, and to communicate. They are also highly rated because of their success in blending corporate, brand and commercial objectives with a clear focus on social impact.

C&E 2011, p. 24
All these factors could quite possibly have been applied to the Sunlight lifeboat campaign over 120 years ago.

Plus ça change? So what’s changed for charities doing business with companies over those 120 years? How effective is the sector being in driving growth and innovation? Corporate partnerships are viewed as the linchpin in many fundraising strategies, but what is the reality behind the assumption?

The reality is simply that a lot in corporate–charity partnerships has changed and yet much has stayed the same. There has been a major evolution in the past ten years both in the way that companies have embraced the concept of working with charities and in the increased number of businesses that are proactively engaged in corporate responsibility. This has come about through the activation of business interest which has been driven by both businesses and charities. However, the beating corporate heart has clearly always been there. From Cadbury and the chocolate company’s creation of cocoa as the healthy alternative to alcohol to the Joseph Rowntree Foundation and social housing, many businesses have established themselves with sound principles which aim to help the local people and their communities. The good old corporate fundraising maxim – people give to people – lies at the centre of all corporate cause partnerships.
Furthermore, personal engagement of the individual, whether the managing director of a small business or the personal assistant to the social committee, is the starting point to finding the people who will really influence and champion the development of mutually rewarding partnerships. And the good news is that, according to the C&E report, while there are some challenges (such as some large differences in how charities and companies view the benefits of non-financial support), the survey reports a buoyant market and the general opinion is very positive and looking towards growth on both sides (C&E 2011, p. 5). The question now, therefore, is how to maximise the opportunity?

**What do businesses want from charities, and why do charities want to work with them?**

For those new to the world of corporate-charity partnerships, understanding the basic concepts of why businesses want to partner with causes and, from a charity’s point of view, understanding what is available from the business world, are essential to pursuing successful partnerships.

It is possible to track the change in corporate-charity partners decade by decade; each has had its own particular flavour and tone. Charities’ relationships with companies have developed significantly from the 1980s when, to a large extent, the chair or chief executive sat on the board of trustees and dictated the company’s charitable support: the great-and-the-good approach with often little involvement or feedback from the staff or connection to the business. In the 1980s it was common to give sponsorship in return for the company’s logo on the charity’s headed paper or in the pages of the high-profile event programme. During the 1990s the emphasis moved to corporate cause involvement, which reflected a significant shift from the previous decade towards a more considered, business-like approach and set a new corporate cause agenda. It was at this time that the corporate social entrepreneur emerged and companies looked more closely at what they were donating to and started to want greater involvement in the cause.

One of the first breakthroughs of this sort was the Prince’s Trust’s £1 million Mercury Communications sponsorship, which was an initiative led from the marketing departments of Mercury and the Trust’s fundraising team (Drew 1993). Because of Mercury’s major financial commitment, the partnership travelled throughout the company top-down. This was a multi-stranded, multi-functional relationship that involved national and regional events, senior management, employees, marketing, suppliers and customers and resulted in what is now the well-established Mercury Music Awards.

Moving to the new millennium, there has been an increase in focus on what the charity agenda could bring to business. Companies began creating