

Fifth edition

Corporate Fundraising and Partnerships

Edited by
Valerie Morton



dsc
directory of social change

In association with:

**SUSTAINABLE
PHILANTHROPY
WITH
PLYMOUTH
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Institute of
Fundraising

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About the Fundraising Series

Despite paid fundraisers having existed in some form since the middle ages, fundraising as we know it today is still an emerging profession. The Institute of Fundraising has only been in existence for just over 30 years, and it is only relatively recently that academics have begun to pay attention to the science behind giving to others.

A vitally important element of any profession is its body of knowledge – it's what enables members of a profession to grow, learn and reflect. Immersing oneself in that knowledge is, arguably, what makes one a professional fundraiser.

This series is an important part of bringing together fundraising's body of knowledge. It combines the best of the practical knowledge of experienced fundraisers with, increasingly, the expanding body of academic knowledge around giving and asking.

The series seeks to address the full range of fundraising activities and techniques. Each volume addresses a key element in the spectrum of fundraising techniques. As fundraising techniques evolve and develop, new titles in the series are added and old ones revised. Each title seeks to explore a fundraising activity within its historical, ethical and theoretical context, and relate it to current fundraising practice as well as guide future strategy. The series offers something for anyone who is aspiring to be a professional, whatever the size or type of their organisation, or stage of their career.

The University of Plymouth Hartsook Centre for Sustainable Philanthropy is proud to partner with the Directory of Social Change in the series' production. Furthermore, the series would not be possible without the input of many dedicated professionals involved in its writing and production: we thank everyone who has contributed to its development.

Adrian Sargeant PhD, Professor of Fundraising and Director

Claire Routley PhD, Research Fellow

Hartsook Centre for Sustainable Philanthropy, University of Plymouth

About the Directory of Social Change

The Directory of Social Change (DSC) has a vision of an independent voluntary sector at the heart of social change. We believe that the activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to support these organisations in achieving 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 policy-makers, as well as offering bespoke research for the voluntary sector.

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. Our subscription-based websites contain a wealth of information on funding from grant-making charities, 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 and fairs, which take place throughout the year, also provide training on a wide range of topics and offer a welcome opportunity for networking.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk, call 020 7697 4200 or email cs@dsc.org.uk.

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Natalie has worked on successful corporate partnerships with companies such as the Bank of England, Euromoney, the Financial Ombudsman

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James is a keen fundraiser and a volunteer. Notable achievements include serving as a school governor since 2009, piloting a scheme to help primary school pupils with their reading, and cycling from London to Barcelona with 30 other Ricoh cyclists in 2015, collectively raising £150,000 for the Institute of Liver Studies at King's College Hospital NHS Foundation Trust.

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In 2014, Lynda was awarded the Erasmus EuroMedia Award Seal of Approval for her short film to promote awareness and fundraising for Guide Dogs' Children's Services. Lynda is an advocate for access to education for all and has spoken at the European Parliament, the Houses of Parliament and the Scottish Parliament regarding education and support for children and young people with sight loss.

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Chris's particular interests lie in converting complex legal and regulatory issues into practical solutions for charities on the ground. He writes and speaks widely on charity issues and has served as a trustee, volunteer or legal sounding board for many charities.

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Mark is a freelance corporate sustainability consultant with over 30 years' experience. He has supported major multinational corporations across most industry sectors, working with corporations including ArcelorMittal, Bacardi Limited, Guardian News and Media, and Toyota Motor North America. For nearly a decade, he signed off Unilever's global environmental disclosures.

Mark was a co-founder of the sustainability agency Two Tomorrows and played a leading role in developing the international team that joined DNV GL in 2012.

Valerie Morton

Valerie's career in the voluntary sector has spanned four decades and has included holding senior positions in charities such as Help the Aged, RNIB and YMCA. She now combines providing consultancy support to charities with training, advising and commentating on best practice.

Valerie's passion for the opportunities created by corporate-charity partnerships began at the NSPCC, where she secured and managed the first-ever UK £1 million adoption with Asda and launched the then newly created payroll giving scheme. Valerie has held numerous voluntary positions including membership of the Institute of Fundraising's Standards Committee and its Policy Advisory Board and is honoured to have been awarded the position of Fellow of the Institute. She is a trustee of the RNIB Retirement Benefit Scheme and of a small grant-making trust in Newcastle.

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Cian is Head of Data Analysis at nfpSynergy, a specialist non-profit research agency. He has previously worked on the Fundraising Insights Team at the British Red Cross, and has led on quantitative research projects with many of the UK's largest fundraising charities while at nfpSynergy.

Cian now works across the agency's syndicated and bespoke tracking research to develop its quantitative research offering, focusing in particular on segmentations, driver analysis and other advanced data analysis. He is also responsible for statistics training and has helped many nfpSynergy staff members to achieve qualifications from the Royal Statistical Society.

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Andrew is an award-winning fundraiser and consultant with 25 years' experience in the UK charity sector. Having led fundraising teams at Help the Aged, the British Red Cross and Sightsavers, he set up Peel Consulting in 2007 and has now worked with more than 70 charities including the British Heart Foundation, Diabetes UK, Guide Dogs, Saltdean Lido, TB Alert and a wide range of hospitals and hospices.

Andrew specialises in corporate and trust fundraising, and in developing impactful proposals, applications, pitches and strategies for clients. He is also a trustee of two charities in Brighton. A full member of the Institute

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Sarah previously worked for children's and youth charities: Barnardo's in new business development, and The Prince's Trust in Yorkshire and at the Trust's London headquarters as project manager of the corporate employee-engagement challenge, Million Makers.

Preface

Welcome to this the fifth edition of what I am honoured to be able to describe as the UK's bestselling book on corporate fundraising. Followers of previous editions will have noticed the new title: *Corporate Fundraising and Partnerships*. Any long-established corporate fundraiser will say that, although raising money through working with companies has always been their key objective, the very nature of companies, their resources and their influences has meant that many of the benefits charities have gained have been other than directly financial. What we have seen in the course of the past 20 or so years is that these benefits are being formalised and considered strategically rather than being considered a 'nice-to-have' added extra. For this reason, we felt that simply repeating the title *Corporate Fundraising* was doing a disservice to the many people who are creating inspiring and multi-faceted relationships between charities and the corporate sector. The addition of the term 'Partnerships' not only demonstrates this still-growing development but also describes more accurately the relationship between the two sectors. No longer is it simply transactional; it is now a bringing together of two parties working together, creating ideas for mutual benefit. Several of the chapters expand upon this theme and set out some of the wide-ranging benefits that can be achieved in this way.

Reflecting on the development of the corporate–charity environment over the 20 or so years since the first edition of this book, it is interesting to note that – even in that early edition – the contributors heavily emphasised best practice, standards and responsibilities. Nowadays these principles are all part of our common vocabulary and the issue of standards in fundraising is now particularly front of mind with the birth of the Fundraising Regulator. Charities now are looking at how to embed fundraising standards in their day-to-day working, and some guidance on this is offered in 'A note on best practice' on page xvi.

The term 'corporate social responsibility' first made an entrance in the second edition (in 2002), but readers of this latest edition will note that the concept is now more commonly known as 'corporate responsibility' (and in some arenas 'corporate responsibility and sustainability'). 'Corporate responsibility' is the standard term used in this book. Despite changes in terminology, the elements of this fundamental principle remain the same but are now embedded in society through the UN Sustainable Development Goals, as explained in chapter 1. Other terminology choices in the book include:

- ‘charities’ and ‘the charity sector’, except when referring to the wider sector, where we alternatively refer to the not-for-profit sector, or when a different context is being reported on, such as referring to studies that use the term ‘NGOs’;
- ‘companies’ or ‘corporates’ – these terms are intended to include all forms of business entity, including public limited companies, companies limited by guarantee, limited liability partnerships, sole traders and, in some cases, employers.

Corporate fundraising managers in the process of developing their latest strategy will inevitably, during their research into the market place, be considering whether the Charity of the Year concept is reaching the end of its product life cycle. This has been a subject of discussion for some time now; however, it is clear that, although the name may be changing (such agreements often involve more than one charity and may not last for exactly one year), the concept of a company adopting one or more charities with which to work alongside for a period of time is alive and well. The principles of managing those relationships effectively have stood the test of time.

The innovative and effective case studies showcased in this book are a testament to the excellent work of those who operate in the corporate partnership arena. I hope these, and the wise words of the chapter authors, provide inspiration to a new generation working in this incredibly rewarding environment.

Valerie Morton

Acknowledgements

I would like to thank all the charities, companies and individuals who have given of their time and experience and provided case studies to enrich the value of this book to readers.

Andrew Peel, in addition to being a contributing author, has been a trusted advisor to me throughout the gestation of this book. His analysis, challenges and perceptive attention to detail have been invaluable and his good-humoured approach much appreciated.

This fifth edition of *Corporate Fundraising and Partnerships* (formerly *Corporate Fundraising*) has been completely revised and updated but I have retained some material from previous editions where I feel it still reflects current thinking and best practice. I would therefore like to recognise and thank in particular Alice Collins, Ian MacQuillin, Anne Shinkwin and the late Claire Wilson.

The first chapter of the first edition of this book (published in 1999) was written by Tony Elischer, who sadly passed away in 2016. Tony was a great advocate of corporate–charity partnerships and he and I worked together to develop the first training courses on the subject for the Institute of Fundraising. His passion and enthusiasm for fundraising have impacted so many of us over the years and I hope that this book is a fitting reflection of his inspiration.

The publisher and I would like to thank the following people and organisations for their contributions to the case studies:

- Chapter 2: Richard Turner, former Chief Fundraiser and Head of Operations at SolarAid (2011–2016).
- Chapter 4: Ollie Langham, Corporate Partnership Manager at St Elizabeth Hospice; Willis Towers Watson.
- Chapters 5 and 6: Lila Dowie, Senior Corporate Partnerships Manager, and Claire Ellis-Waghorn, Head of Fundraising at Demelza; Ben Swart, Head of New Business at the NSPCC.
- Chapter 7: Andrea Berriman, Corporate Partnerships Specialist; Marks & Spencer; WWF-UK.
- Chapter 8: Hannorah Lee, Head of Corporate and Community Partnerships at Age UK; Kate Lovesey, Senior Corporate Volunteering Manager at Macmillan Cancer Support; Nick Vassallo, New Partnerships Manager at Alzheimer's Society.

- Chapter 9: BMW Group UK.
- Chapter 11: Sandra Arellano, Communication Manager at BT; Jane Lamb, Senior Corporate Partnerships Manager, Comic Relief.
- Chapter 12: Serena Castiglione, Head of New Markets at the International HIV/AIDS Alliance and former Head of Corporate Engagement at Breast Cancer Now (2016–2017).
- Chapter 14: Jenni Anderson, Director of Fundraising at the Duke of Edinburgh's Award and former Director of Income Generation and Marketing at Haven House Children's Hospice (2013–2017).
- Chapter 15: Hannah Brewer, Corporate Partnerships Manager, The Prince's Trust; Fiona Wolstenholme, Corporate Partnership Manager, BBC Children in Need.

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A note on best practice

Introduction

Charities are accountable, in some form or another, to a wide range of stakeholders, including donors and beneficiaries. From the perspective of an individual charity, following best practice ensures that donors' money gives the maximum possible outcome for beneficiaries and the cause. From a sector-wide perspective, following best practice is fundamental to maintaining reputation across the whole not-for-profit environment.

The issue of best practice can be broken down into two parts. The first is to ensure that fundraising is carried out using methodologies and processes which are known to offer the best return on investment. In the field of corporate fundraising this would include, as explained in chapters 2 and 4, taking a relationship-building approach or, as identified in chapter 10, negotiating a minimum guarantee when committing charity resources to a corporate partnership.

The second part relates to the standards all fundraisers must follow, which are set by the Fundraising Regulator to ensure that fundraising is respectful, open, honest and accountable to the public. These standards are set out in the Code of Fundraising Practice and include legal requirements. As public scrutiny of fundraising is ever present, corporate fundraising activities are likely to be in the spotlight as much as individual giving.

With the Code of Practice being front of mind in many charities from a governance perspective, it is important that charity leaders recognise that the Code is a set of standards, not a training manual on how to fundraise effectively. Therefore, following the standards set out in the Code does not guarantee the quality of the fundraising itself. This principle is mirrored in other industries – for example, in advertising, where the Committee of Advertising Practice sets the rules for advertising, which are regulated by the Advertising Standards Authority, but practitioners still need to receive training and qualifications in the field of marketing. A car MOT offers evidence that a vehicle is roadworthy but says nothing about the skill of the driver.

When budgets are tight, it is often the training and development budget that is cut. Charity leaders should appreciate, however, that investment in developing the knowledge and skills of their fundraisers is the foundation of best practice.

Embedding the Code of Fundraising Practice

Although some sections of the Code stand out as being relevant to corporate fundraisers (such as ‘Corporate partners’ and ‘Fundraising through payroll giving’), any fundraiser involved in working with companies will, from time to time, need to have knowledge of other aspects of the Code (for example ‘Payment of fundraisers’, ‘Raffles and lotteries’ and ‘Handling donations’). It is important, therefore, that charities have systems and processes in place to ensure corporate fundraisers understand the principles behind the Code, know the detail of its specific sections and have a good appreciation of its full content so that they are attuned to occasions where less obvious aspects become relevant.

The Code of Fundraising Practice is regularly updated to reflect changes in laws and issues which have been profiled through the Fundraising Regulator’s complaints procedure, so embedding any changes in day-to-day fundraising is vital. Although it is tempting to concentrate on ensuring staff have knowledge of the details within the Code, there is a danger that this will simply lead to staff having a peak of knowledge at the start of the process with this knowledge naturally declining over time.

An effective four-stage approach involves:

- **Stage 1:** Gain top-level commitment (from trustees and directors) to follow best practice in all fundraising activities and agree a headline strategy which includes policy decisions arising from the Code; the investment that will be made (in terms of both time and money) to address any identified issues; and charity-wide implications and impacts, such as with regard to financial systems and HR. This stage should also involve ensuring that all trustees have an appropriate understanding of the principles of fundraising, that they appreciate their responsibilities with respect to fundraising and, if necessary, that they have access to a relevant development programme.
- **Stage 2:** Develop buy-in from fundraising staff to the concept and structure of the Code and understanding of the principle and practice of regulation. This can be achieved through specific stand-alone training sessions or in existing meetings, such as team meetings or away days. Most fundraisers are committed to working to high standards and may see the Code as something which reflects how they operate rather than being something they have to have read, understand and follow. This stage is crucial to avoid reading of the Code being seen as a burden. Staff need to be enthused by the benefits of following best practice and to recognise that this supports the status of fundraising as a profession.
- **Stage 3:** Ensure all fundraisers read the Code. Reading it in one session or over a short time frame will clearly be a challenge and is unlikely to result in much of the information being retained. However, it can be

effective to incentivise the reading of the Code over a specific time frame by, for example, offering allocated reading times, group reading and time off to read at home, alongside a promotional campaign.

- **Stage 4:** Policies, procedures and infrastructure need to be developed and implemented to ensure that the momentum is maintained, that new starters are integrated into the systems and that control mechanisms are in place. This may include considering the roles of the induction process, appraisal systems and links with internal audit functions.

Best practice in corporate fundraising and partnerships

The chapters and case studies in this book reflect the key elements of best practice as set out in the Code at the time of publication. Although fundraisers working in this area need to have detailed knowledge of the elements of the Code that specifically relate to corporate fundraising and partnerships, it is important to have knowledge of other aspects which impact on fundraising generally and which could be relevant when working with companies. Examples include working with third parties, use of lotteries, collection of cash donation and working with volunteers.

Valerie Morton

Foreword

My charity is just not sexy – no brands will want to be associated with us.

My charity will never win a staff vote.

My colleagues think life would be so much easier without corporate partners to consider.

Many corporate fundraisers in their darkest days will have had one or all of those feelings – I know I have. One of the benefits of reading the new edition of *Corporate Fundraising and Partnerships* is that it makes you realise you are not alone. Although our organisations and the causes we fight for may be unique, the challenges we face as fundraisers are not. In this book, Valerie Morton has assembled a brilliant group of contributors to share their wisdom with you, and the result is a hugely useful guide to how others have met these challenges head on and overcome them.

I also know, from my own experience (most recently at Anthony Nolan and at Macmillan) and from reading this new edition, that building successful partnerships doesn't have to involve a revolutionary new approach. Instead, it is based on having a great understanding of the discipline and the processes required for success. Setting firm foundations for your work with a clear vision, the right team structure and a strong focus on the right opportunities will put you in a good place to make you ready to enter into a partnership. It doesn't matter whether your organisation is big or small, or whether you have a sexy brand or are relatively unknown – get the basics sorted and you are in the game along with everyone else.

This book is a great reminder of what the current best practice is and it offers priceless practical advice on the best methods and approaches to take at any given stage of a corporate partnership, from creating your corporate fundraising strategy and targeting new partners right through to how to negotiate effectively and manage the corporate account.

Corporate Fundraising and Partnerships offers wisdom and advice on the full spectrum of the subject, from a helpful history to the latest trends and techniques. More crucially, it will set you right for your future fundraising path by making you better prepared and more confident, with a greater prospect of achieving fantastic charity–corporate partnerships. Happy reading.

Alix Wooding, Director of Development, Southbank Centre

Corporate–charity partnerships: history, evolution and future

Valerie Morton and Mark Line

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 (see figure 1.1), which was donated by Lever Brothers in 1887. Llandudno Lifeboat Station reported that Lever Brothers ‘ran a special competition to fund the new lifeboats’.¹

Over a century later, in 2017, the most admired corporate–cause partnership, as voted for by companies and NGOs in the *C&E Corporate–NGO Partnerships Barometer 2016* report,² involved GlaxoSmithKline (GSK) and Save the Children. It was described by GSK as a ‘blueprint for a new way of working, transforming the traditional fundraising NGO/corporate model’.³ The Lever Brothers example ultimately helped to save lives at sea whereas the GSK partnership is focused on preventing children from dying unnecessarily. This demonstrates that despite the many changes in society over that time period, and the advent of the term ‘corporate social responsibility’, a thread of common objectives remains.

This chapter provides the history and context of corporate involvement with the charity sector and considers what the future may hold.

The corporate perspective: the rise of corporate social responsibility

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 established themselves with sound principles which aimed to help employees, local people and their communities.

The move towards a more structured approach to responsible business practice was initially driven by environmental concerns. Throughout the 1980s, a series of high-profile accidents focused public attention on environmental protection and a wider responsibility towards communities impacted by hazardous operations globally. Events such as the explosions

at the Bhopal chemical plant in 1984, the accident at the Chernobyl nuclear power plant in 1986 and the Exxon Valdez oil spill in 1989 polarised public opinion. They created a wave of green consumerism and a sharpened focus upon the responsibilities of multinational corporations. The interdependence of environmental and social issues was not yet understood at this time, and so companies' responses to pollution and social issues were disconnected and fragmented.

FIGURE 1.1 *SUNLIGHT NO. 1 LIFEBOAT*⁴



By 2000, the early movers in the corporate world were concentrating on environmental issues that were under their direct control. The social conscience that had been common in companies in the Victorian era, in the likes of Boots, Colman's, Guinness and Unilever, had yet to re-emerge formally. The main social focus, if any, was on the health and safety of employees. Issues such as corruption and bribery were regarded as the responsibility of governments.

As the concept of corporate social responsibility matured, most companies that responded initially interpreted it as a local or community endeavour, involving activities such as investment in sporting facilities, a charitable donation to aid organisations in developing countries or support for staff volunteering. Contributions to good causes were largely ad hoc and far from entailing strategic, long-term collaborations with

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