



CSR & FUNDRAISING TRAINING TOOLKIT

**A comprehensive training toolkit for
youth workers on getting SMEs
support through CSR activities**

Abdurrahim Gunaydin, Anne L'Henoret,
Aureliusz Lezenski, Eleni Georgakakou,
Paula Beudean, Manos Andreadis,
Urszula Puchalska, Vedat Sevincer

The Toolkit

Training toolkit for youth workers on getting SMEs support through CSR activities

Authors

Paula Beudean,
Vedat Sevincer,
Manos Andreadis,
Aureliusz Lezenski,
Anne L'Hénoret,
Urszula Puchalska,
Eleni Georgakakou,
Abdurrahim Günaydin



Project Partners



partner organizations:

NorSensus
MEDIAFORUM

FUNDAȚIA DANIS
pentru Dezvoltare Managerială



AKTIV UNGDOM

<https://coop.norsensus.no>

Copyright 2019

The European Commission support for the production of this publication does not constitute an endorsement for the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained herein.

ACKNOWLEDGMENTS

We would like to express our gratitude to all of those who have contributed to this Toolkit.

Much of the knowledge contained in this Toolkit is based on the experience of the partner organizations involved in this project, as well as information collected for the CoOp Studies on SMEs and Youth Organizations Cooperation in each of the partner countries from experts as well as company and Youth organization representatives. For more information please see: <https://coop.norsensus.no/library/>

We would like to thank all those involved for the support they provided and for their shared belief, that providing tools to help build cross-sector partnership is of value to all involved. This Toolkit is rooted in the principle that more can be achieved by working together than alone and is intended to be used by Trainers who want to bring the concept of CSR and NGO-business partnerships to a wider audience of Youth workers. We would like to thank all those future Trainers in advance for doing so!



TABLE OF CONTENT

About the Toolkit	7
How to use the Toolkit	9

Chapter 1:

CSR - Allowing for Cross-Sector Alliances	10
1.1 What Is CSR?	10
1.1.1 Areas of CSR Impact	11
1.2 Why CSR?	13
1.2.1 Sustainable Development as a driver for CSR	15
1.2.2 Different Perspectives on CSR	16
1.3 CSR for Community	18
Workshop Scenario: CSR in Business – the what, why and for whom	20

Chapter 2:

Build your CSR Potential	23
2.1 Why would Youth NGOs get involved with SMEs?	23
2.1.1 CSR with SMEs compared to Large Corporates - the pros and cons	25
Workshop Scenario: Youth Project Needs Assessment	28
Workshop Scenario: From Needs to Asks	30
2.2. Get your organization CSR ready	32
Workshop Scenario: Moderating an effective team meeting on cooperation with a business partner	35

Chapter 3:	Understand SMEs and learn more about your partners	37
	3.1 Understand SMEs' motivations and challenges in supporting Youth organizations	38
	3.1.1 CSR Benefits for SMEs	39
	3.1.2 Challenges	40
	Workshop Scenario: Identifying SMEs' motivations and challenges in supporting Youth organizations	42
	3.2 Profiling your potential business supporters	44
	Workshop Scenario: Profiling potential business supporters	46

Chapter 4:	Prepare your organization for better relationships with SMEs	48
	4.1 Build your organization's reputation on trust and transparency	48
	Workshop Scenario: Building organizational reputation through powerful stories	53
	4.2 Learn how to pitch your organization and your projects to SMEs	55
	Workshop Scenario: Learn how to pitch!	58
	Workshop Scenario: Use the 'golden circle' to present your organization	60
	4.3 How to communicate goals, objectives, added value and results to your business donors	61

Workshop Scenario: Stick your objectives, KPIs and results here!	64
Workshop Scenario: What is your Theory of Change?	66
4.4 Building meaningful relationships with your potential or current business supporters	68
Workshop Scenario: Show your business supporters that you care about them	70

Chapter 5:

CoOperation in Practice	72
5.1 Receiving Business Support	72
5.1.1 In-Kind Support	72
Workshop Scenario: Preparing to ask for in-kind support	76
Workshop Scenario: When CSR support 'goes bad'	78
5.1.2 Financial Support	79
Workshop Scenario: Developing a project idea with the use of Fundraising Tools - The Business Model Canvas	81
5.2. Relationship Maintaining - Good Practices	82
5.2.1 Sending stories about the organization	82
5.2.2 Exquisite Day for Entrepreneurs	84
5.2.3 Enhancing sustainable synergies: the example of ASSET tec – CityCampus	85
5.2.4 Beyond Project Reporting: Staying in Touch with Business Partners	86
5.2.5 Inspiring your Partners and creating a sense of community	87
5.2.6 Holiday Greetings	89

ABOUT THE TOOLKIT

The CoOp Training Toolkit (Training toolkit for youth workers on getting SMEs support through CSR activities) was developed as part of 'Cooperate to Operate – bringing together Youth organizations and SMEs through corporate social responsibility' (CoOp) project, <https://coop.norsensus.no/>.

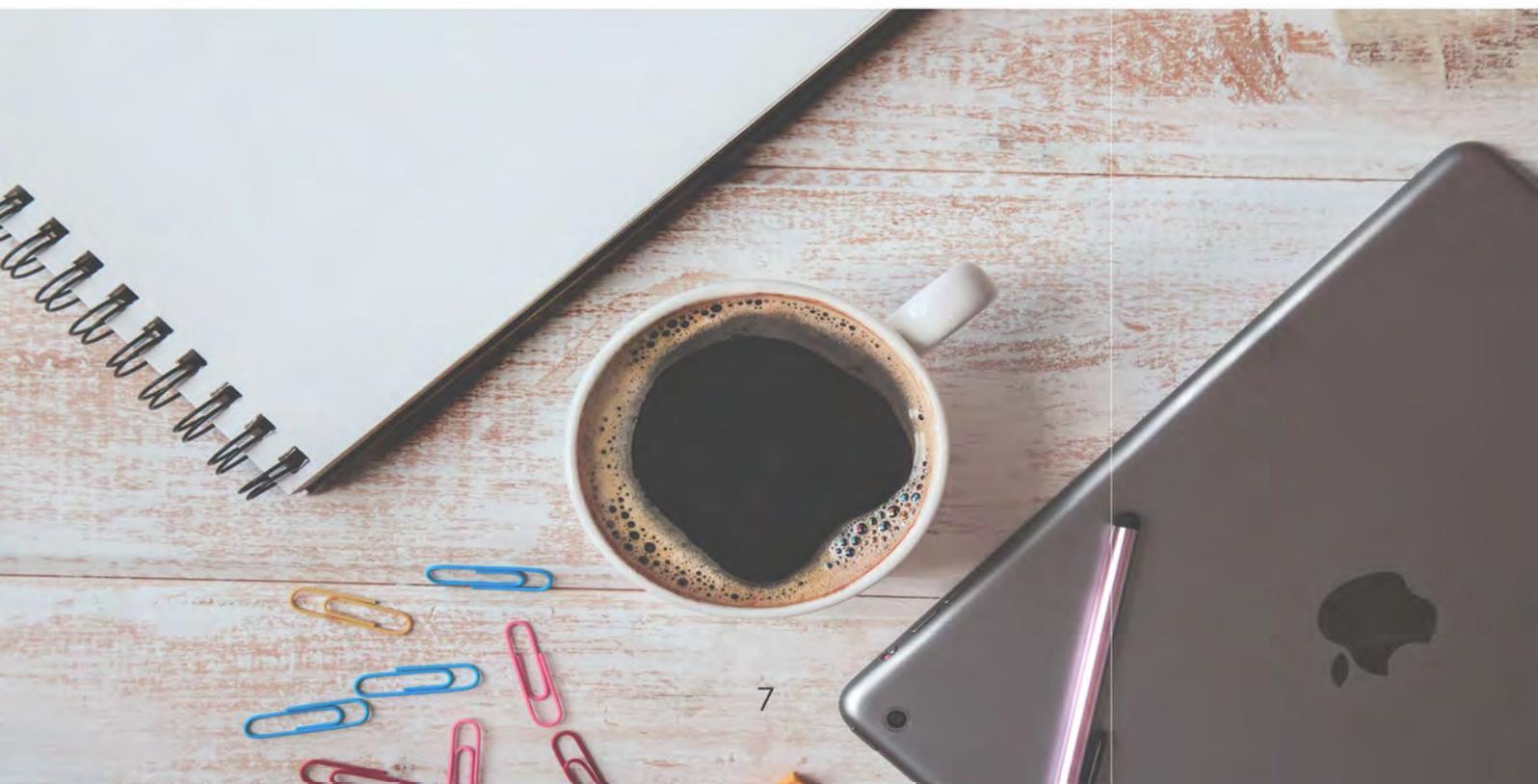
The main goal of the Toolkit is to provide interested Trainers/Youth work leaders with the necessary theoretical and practical knowledge to be able to build among other Youth workers enough understanding so as to foster more cross-sector partnerships among Youth not-for-profit organizations and small to medium businesses.

The Toolkit was written in collaboration by the five CoOp partners: Asset Tec (Greece), Youth Work Ireland (Ireland), Norsensus Mediaforum (Norway), Fundacja Robinson Crusoe (Poland) and Fundația Danis pentru Dezvoltare Managerială (Romania).

The information provided and workshop scenarios developed are based on each organization's expertise but also on the findings from the CoOp Studies on SMEs and Youth Organizations Cooperation which can be accessed at <https://coop.norsensus.no/library/>.

The CoOp Training Toolkit was developed based on the CoOp research results presented in the CoOp National Studies on SMEs and Youth Organizations Cooperation. The data collected helped us in deciding on the key topics and directions we should take in developing the Training Toolkit sections, so that this is completely relevant for youth workers and youth organizations from Ireland, Greece, Norway, Poland and Romania.

The training toolkit is a ready tool that can be used by youth organizations to train their youth workers on: what means and how they could use corporate social responsibility framework in assuring financial sustainability of their organization; how to collaborate with SMEs; how to get their support for the youth development projects; but also on how to advise SMEs on CSR strategies and programs.



At this point we also need to clarify the terms used in this Training Toolkit:

Small to Medium Enterprises (SMEs) are business entities which, based on the definition of the European Commission (2005)¹, fulfills the following criteria:

Enterprise category	Headcount: Annual Work Unit (AWU)	Annual turnover	or	Annual balance sheet total
Medium-sized	< 250	≤ €50 million <small>(in 1996 € 40 million)</small>	or	≤ €43 million <small>(in 1996 € 27 million)</small>
Small	< 50	≤ €10 million <small>(in 1996 € 7 million)</small>	or	≤ €10 million <small>(in 1996 € 5 million)</small>
Micro	< 10	≤ €2 million <small>(previously not defined)</small>	or	≤ €2 million <small>(previously not defined)</small>

Based on the above definition we aim to support not-for-profit Youth focused organizations in building cross-sector partnerships with companies who have below 250 employees and a turnover of a maximum of 50 Million Euro per year. By “Youth focused” we refer to not-for-profit organizations, also called NGOs, who support young people up to 29 years of age.

Before going further, it needs to be mentioned what CoOp partners refer to when using the “youth organization” term and the “CSR” (corporate social responsibility) and “community involvement” concepts. For CoOp partners a youth organization is an organization initiated and/or run predominantly by young people or an organization (NGO, nonprofit, charity, association, foundation, etc.) that predominantly works with young people, providing them specific services. CoOp partners are also aware of the complexity of the CSR concept, and all the areas it might include, such as business ethics, good governance, human rights, environment policies, economic value, labour issues and employees’ rights, clients’ rights, societal value, community and social projects, etc. - to name just a few of the CSR themes. However, in the CoOp project we are mainly interested in the companies’ involvement in community or social projects. In this sense, there might be some parts in this report, but also in the national reports, in which we use alternatively community involvement and CSR activities, referring in both cases to those actions that the companies take to contribute to specific projects and activities that respond to specific societal needs from their local communities, or at national or international level.

¹ European Commission. (2005). The new SME definition. User guide and model declaration, Enterprise and Industry Publications of European Union, <http://ec.europa.eu/DocsRoom/documents/15582/attachments/1/translations>.

HOW TO USE THE TOOLKIT

The Toolkit consists of five main chapters. Each chapter has a theory section followed by corresponding workshop scenarios which relate to the theoretical part. We recommend to first read the theoretical part before continuing to the training scenarios. The objective was to create the training scenarios in such a manner, as to allow also less experienced trainers to provide workshops or to facilitate meetings on the various topics covered. Simple, step-by-step instructions are provided, with information on the time and materials required. The scenarios require reflection and active involvement from all participants. This workshop style training allows the participants to learn and memorize most effectively, thus providing the best results for further implementation of the topics covered.

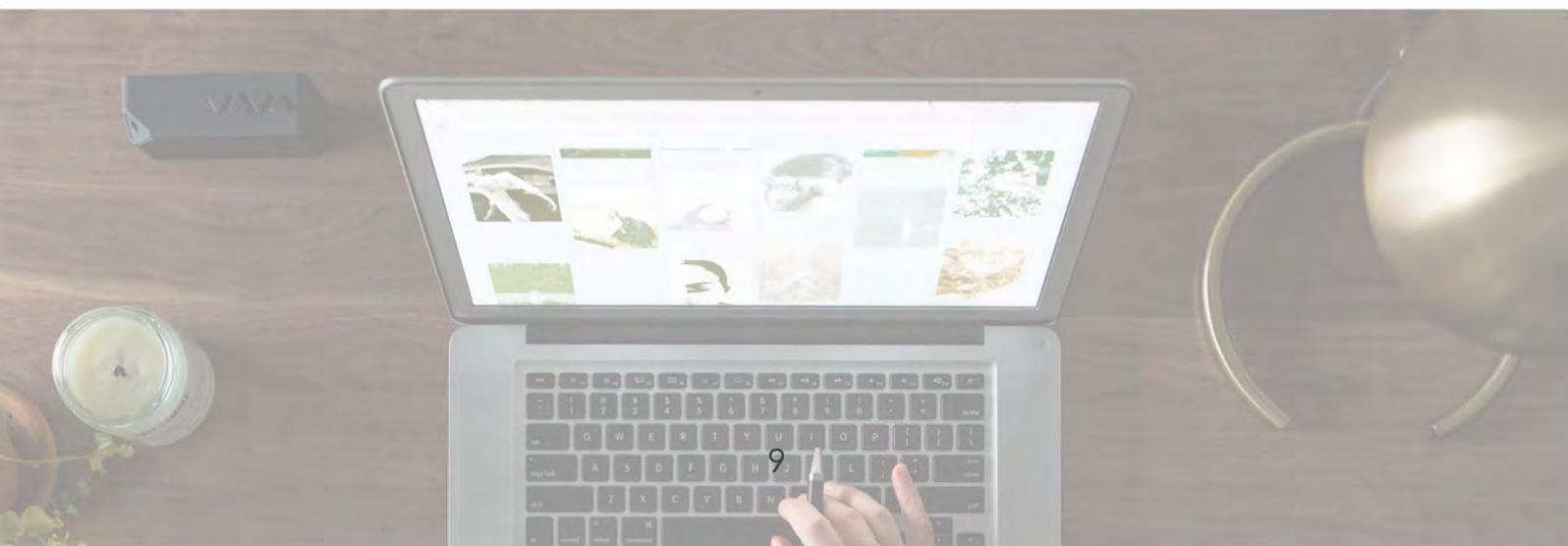
The 1st chapter provides a general overview of the term CSR and its use. Further, areas of CSR impact and the motives for engaging in CSR are explored. Elaborating also on the reasons of sustainable development being a driver for CSR. Moreover, the understanding of CSR is evolving and changing over time, not all companies are equally advanced, many are just starting. Therefore, it is important that NGO representatives also take an active role in educating SMEs. There are good reasons why SMEs should want to engage in CSR activities supporting the community, and many are doing it already without knowing the term “CSR” its use.

The 2nd chapter provides reasons on why NGOs should consider next to large corporations also SMEs as potential partners for cooperation. Further, some tools are provided which help to set up a fundraising strategy by assessing the needs of the organization and developing an understanding among employees and volunteers for business sector needs.

The 3rd chapter aims to provide NGOs with the SME perspective, their motivations and challenges they face regarding CSR engagement, specifically community project engagement. In order to allow NGO staff to better identify and understand their potential SME partners, relevant knowledge and tools around the profiling process are introduced.

The 4th chapter provides NGOs with the insights on how to build your own brand, use the same “language” as a business entity does in order to sell the project idea. Developing knowledge and skills to enhance communication among NGO staff is the prime focus therefore also pitching a project idea is introduced in this chapter.

The 5th chapter provides insights on fundraising focused on in-kind and financial support. Information as well as ready tools are introduced which can be put into practice when aiming to build a partnership with SMEs. The second part of this chapter showcased some best-practices from the partners of this project in Communication and Donor Relationship Management.



CHAPTER 1: CSR – Allowing for Cross-Sector Alliances

CSR is a term used by the business sector more than the NGO sector, as it focuses on explaining a company's responsibility towards society. However, as the NGOs' mission is to solve and/or minimizing existing problems in societies, they can collaborate with companies as partners in helping them to realize this responsibility. Therefore, in order to fulfil their purpose and mission, Youth organizations, and NGOs in general, can build with business sector alliances. Often, a barrier to building such an alliance, is the lack of understanding around how a cross-sector alliance can be set up and be beneficial for both sides. Here the NGO sector can take an active role in educating companies, no matter their size, about the issues that need be tackled in the local community or society at large. Before doing so, it is important to understand what businesses want to focus on with regards to CSR. This chapter aims to provide a knowledge base that can be used by NGO representatives to understand what role they can play in initiating and supporting CSR activities.

1.1 What Is CSR?

It is not easy to provide a uniform answer to what CSR exactly is, as its meaning and the underlying concepts have changed dramatically over the last decades. However, even though the underlying concepts evolved, the term "CSR" is still in use. Defining the meaning of each of the words that make up the term, we can distill what the essence of CSR is and why it is important.

Corporate - implies that it is about business... that it is about profit making and not charity.

It is about building a sustainable business model that will continue to deliver business results for stakeholders, and especially the shareholders of a company.

Social - tells us this is about society.

It is about the impact business has on society and how we can manage this impact to ensure both business and social benefits. When thinking about the environmental impact businesses can have, it is also about the business entity minimizing this effect so society can benefit from a clean and healthy environment.

Responsibility - indicates that business has a responsibility.

Responsibility to do business in a way that benefits both business and the society. Further, this responsibility gives businesses the opportunity to create new solutions to the needs of society, and our survival on the planet.

By putting the three words together – Corporate, Social, and Responsibility, the concept paints a picture of the relationship between business and society, and the responsibilities they have towards each other. Business cannot equal philanthropy, it needs to make profit, however society can expect, and even demand, from businesses to take responsibility for any negative effect they might have on communities on a local, national or global level.

Therefore the CSR definitions which best fit the current trend in business-society relationships are as follows:

“CSR is the commitment of businesses to behave ethically and to contribute to sustainable economic development by working with all relevant stakeholders to improve their lives in ways that are good for business, the Sustainable Development agenda, and society at large” (World Bank).

“CSR is about companies taking responsibility for their impact on society” (European Commission).”

1.1.1 Areas of CSR Impact

The areas of CSR impact and the things companies want to focus on when engaging in CSR vary from company to company. There are some general guidelines, which are based on international standards (e.g. **ISO 26 000**, **UN Global Compact**, **EU Reporting Directive**) on what companies should report on with regards to the CSR activities they want to implement. However, SMEs are not obliged to report on their CSR activities in the way that large multinational companies are and SMEs are comparatively freer to choose what kind of CSR they get involved in and whether to do it at all.² Generally speaking however, 4 CSR areas can be identified, where companies can and do impact:



Source: mallenbaker.net/csr/definition

² https://ec.europa.eu/anti-trafficking/eu-policy/guidelines-non-financial-reporting_en

The Marketplace

The Marketplace part relates to how an organization manages its relationship with its customers, suppliers and business partners. Here aspects like offering/maintaining a certain level of product/service quality, ethical selling and ethical supply chain management all play a role. As an example, sourcing materials from suppliers that do not engage in slave labor or the destruction of natural habitat is a CSR practice that should be implemented. Here an NGO can provide the necessary support to a company for example by organizing educational Trainings for suppliers (e.g. local farmers learning about ecological farming methods) and customers (e.g. healthy cooking classes for families).

The Environment

The Environmental part describes measures that can be taken by businesses to avoid or/and minimize negative impacts on the environment. These include avoiding pollution, reducing CO2 emissions, and implementing waste and energy reduction measures as well as recycling. Here an NGO can for example provide the necessary support by working out together with the company how food waste can be reduced by providing it to homeless shelters or other institutions.

The Workplace

The Workplace area concentrates on a company's commitment to good workplace practices, which will allow it to attract and retain the best employee talent. Having motivated and engaged employees allows a company to increase productivity, good customer service and innovation which in turn leads to overall business success. Possible activities are those that increase work-life balance, promote equality and diversity, improve employee conditions, etc. Here an NGO can provide the necessary support to the company by setting up social impact projects whereby employees get involved in voluntary activities; this can make them feel they can have an impact towards positive change in society, which in turn makes the employees feel more connected and therefore more engaged with their employer and colleagues.

The Community

The Community area concentrates on bringing the business closer to the community by supporting local concerns which can positively impact both the community and the business. Companies can support local communities in a variety of ways, and can include: funding of community projects, sponsorship of local clubs, volunteering by employees in local events... Here the opportunities for a NGO-business partnership are most relevant and useful, as often the business does not have sufficient knowledge or drive to establish community projects on their own. The Community area will therefore be the focus in later chapters so as to introduce the knowledge and tools than can support community focused cross-sector partnerships.

1.2 Why CSR?

Much attention has been given to the social responsibility and commitment of companies in the last years. Following governments guidelines and policies (EU guideline) as well as encouragements from other organizations like the OECD and NGO Watchdogs, but also based on their own voluntary actions, companies are showing a willingness to demonstrate socially responsible behavior. Why? Because their responsible behavior - or lack thereof - have a direct effect on the social and economic context in which they operate, and therefore influence their performance. This is true for large companies but also for SMEs. There are many similarities but also many differences between SMEs and large companies on why they engage in CSR. Those differences will be explored in further chapters, however here we want to highlight the general arguments on why engaging in CSR makes good business sense as well as what the underlying arguments against it are.



Arguments Against CSR

Profit Maximization: Taking on social and moral issues is not economically feasible. Companies should focus on earning a profit and leave social issues to others (see 'Shareholder Theory').

Competitive Disadvantage: Assuming social and environmental responsibilities, places those companies doing so at a competitive disadvantage relative to those who do not; for example, spending money on community projects drains money from the company which could be used for supporting core business processes.

Not the private sector's role: Those that are most capable (Governments and NGOs) should address social issues. Those in the business world are not equipped to deal with social problems.

Arguments for CSR

Moral Argument: It is the right thing to do. The rise of the modern company created and continues to create many social and environmental problems. Therefore companies should assume responsibility for those problems.

Economic Argument: It makes good business sense. In the long run it is in the company's best interest to assume responsibilities. It will increase the chances that they will be able to continue to operate in the long term and will reduce the chances of violating government regulations. There is increasing evidence that CSR can reduce business risks and increase business efficiencies, which can ultimately reduce costs and increase profits. Moreover, showing responsibility allows the company to gain stakeholder support, e.g. customer loyalty, which in the long-run will lead to increased sales.

Given that there are both arguments against and for companies to engage in CSR why there is an increasing pressure on companies to engage in CSR?

This pressure and trend is especially visible among large corporations, who are doing business on a global scale. However, as SMEs are in many cases suppliers and local service companies for those large companies, this trend to consider their social and environmental footprint also impacts the SMEs. The pressure comes from various stakeholder groups, and through the internet information about a company's misconduct can be spread within seconds all over the world. Moreover, as we are all affected by climate change, supporting Sustainable Development has become a must. We all need to do our share, including companies, no matter the size. Of course the sustainability footprint of SMEs is much smaller than those of large companies but nonetheless a very small company is able to do its share on its own scale, by e.g. investing in energy efficient machines, creating job vacancies for Youth from disadvantaged backgrounds, etc. Through CSR activities SMEs are just as able as large companies to contribute to Sustainable Development.



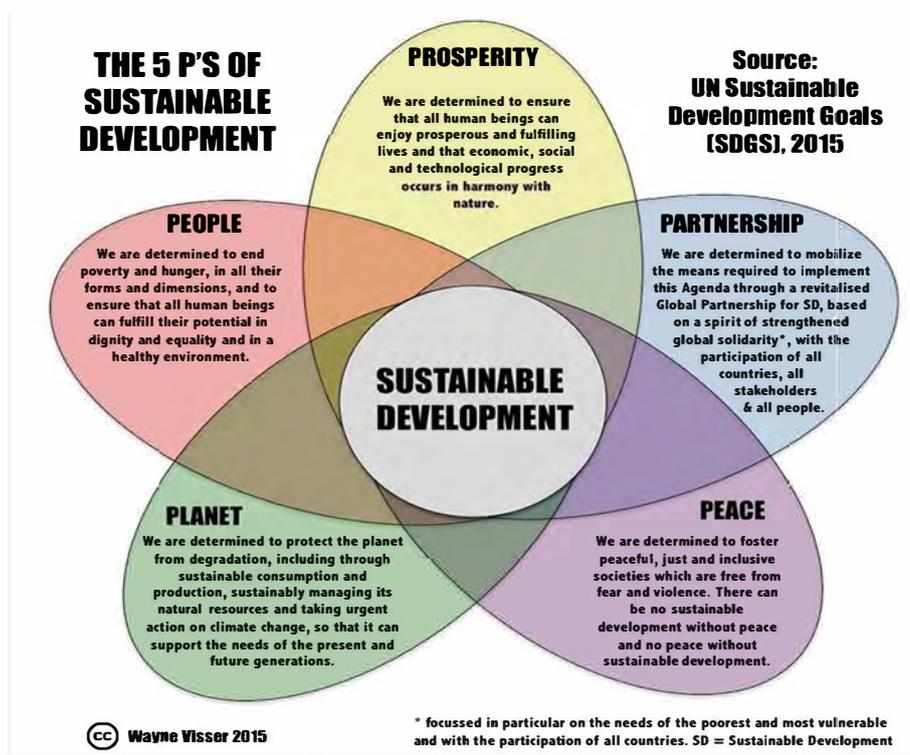
1.2.1 Sustainable Development as a driver for CSR

Sustainable Development and Corporate Social Responsibility are distinct but related concepts. Sustainable Development refers primarily to issues of environmental impact and economic justice, while Corporate Social Responsibility encompassed broader concerns such as company's charitable contributions and role in the community. However, in many instances companies are using CSR to move toward sustainability, e.g. by investing in local Youth community education projects that can positively impact Youth development and therefore the prosperity of the community as such in the future.

With Sustainable Development being defined as:

“Development that meets the needs of the present without compromising the ability of future generations to meet their own needs.” (Our Common Future, World Commission of Environmental Development,1987)

The realization of sustainability is related to the Sustainable Development Goals (SDGs), or also called the Global Goals, set by the United Nations General Assembly in 2015, and describe the world we aspire to have in 2030. They consist of a set of 17 goals, supported by a set of 169 targets, which are a call for action to end poverty, protect the planet and ensure that people enjoy peace and prosperity. In short the SDG's can be summarized through the following visualization: The 5 P's of Sustainable Development, developed by Professor Wayne Visser (2015).



By looking at the 5 P's SMEs can realize that they can, through their CSR activities, also support global sustainability goals which do not only matter to local communities but to the world as such. Much attention is given by governments to the realization of the goals and each country has committed itself to fulfill certain metrics with regards to each criteria; the Media and NGOs are also doing their part to promote and support the realization of those goals, it is worth stressing to SMEs that they should communicate about any CSR activities they engage in, that support Sustainable Development. This will not only give their CSR activities a wider meaning, but also provide them with more reasons to engage in CSR and boost their competitive advantage.

1.2.2 Different Perspectives on CSR

In order to understand the underlying reasons why companies engage in CSR it is important to understand the various viewpoints of both researchers and company representatives on how a business entity might view its responsibility towards society.

Debates between academics, consultants and business executives have resulted in many definitions around a more ethical and more transparent way of doing business. Here are some of the concepts that have been developed and are practiced by companies. These ideas originated first in relation to larger business entities, corporations, however as SMEs are mirroring the large corporates' behavior, these concepts are also valid for smaller businesses.

Corporate Citizenship

"At a minimum corporate citizenship means adherence to laws and regulations and accepted business practices in the places where the company operates" (Logan et al, 1997).

With regards to social responsibility, this can be seen as focusing on philanthropic actions (volunteering, community investment, donations). Generally, the focus is just to meet the minimum demands and expectations, i.e. meeting the laws and regulations of the country of operation.

This concept sees businesses strictly as legal entities, and their only social responsibility is increasing profits in compliance with the laws. It is also in line with Milton Friedman's **Shareholder Theory**, which provides one possible basis on which principles the management of a company should follow. In a famous article published in the New York Times Magazine in 1970, Friedman said:

'The only one responsibility of business towards the society is the maximization of profits to the shareholders, within the legal framework and the ethical custom of the country' (1970).

Therefore the only responsibility of businesses is generating profit and increasing the economic value of the company for its shareholders. Other social activities that companies could engage in would only be acceptable if they were prescribed by law or if they contributed to the maximization of shareholder value.

Business Ethics

Business Ethics is "...the degree of moral obligation that may be ascribed to business entities beyond the simple obedience to laws of a state." (Kilcullen and Ohles Kooistra, 1999) Here the focus is on voluntary commitment to support social and environmental causes beyond on what is imposed by regulations in a given country. The foundational argument in this theory of CSR is that business has power, and power requires responsibility. It also emphasizes that society gives license to business to operate and, consequently, business must serve society not only by creating wealth, but also by contributing to social needs and satisfying society's expectations.

Corporate Social Responsibility

“Operating a business that meets or exceeds the ethical, legal, commercial and public expectations that society has of a business.” (Business for Social Responsibility, in Kotler et al, 2005)

“A concept whereby the companies decide voluntarily to contribute to a better society and a cleaner environment. A concept whereby companies integrate social and environmental concerns into their business operations and in their interaction with their stakeholders on a voluntary basis.” (European Commission).

The concept is linked to the **‘Stakeholder Theory’**, developed by Edward Freeman (Strategic Management- A Stakeholder Approach, 1984) which in contrast to the **‘Shareholder Theory’** takes into account individuals or groups with a ‘stake’ in or claim on the company. These can be for example, employees, the local community, the government, customers, suppliers, etc. In a very general sense, stakeholders are groups and individuals who benefit from or are harmed by corporatenactions. In the Stakeholder Theory, the company should be managed for the benefit of its stakeholders: its customers, suppliers, owners, employees, and local commutnities, and to maintain the survival of the firm (Evan and Freeman, 1988). Freeman insists that the authentic responsibility is to create value for stakeholders, including the local community. Thus, Freeman suggested that the main goal of CSR is to create value for stakeholders fulfilling the firm's responsibilities to them, without separating business from ethics.

Sustainable Entrepreneurship

“Uses creative business to solve problems related to the sustainable agenda. In other words, it is a business with a cause, where the world problems are turned into business opportunities by the deployment of sustainable innovations.” (Abrahamsson, Business with a Cause).

The general idea is to use business for sustainability, rather than integrating sustainability into business. The business can be used to solve social and environmental problems while at the same time striving for profitability. This idea is also very much in line with the ‘Nordic Model’ of CSR which is built on the idea that businesses should be run in such a way that CSR is part of the company's DNA, making the implementation of CSR practices obsolete.

No matter the CSR concept, one must understand that CSR will always have the economic perspective of the business in mind, it cannot be pure philanthropy. In other words, companies will always have economic interests, because they have to make profit for their shareholders; thus, any CSR strategies will always take this interest into consideration, as the companies are accountable to their shareholders or owners. This is something that NGOs that want to partner with large enterprises or SMEs always need to take into consideration. Therefore in order to be able to build a partnership that allows for a win-win on both sides, the interests of the partners, which are shaped by the interest of its stakeholders, needs to be taken into consideration.

1.3 CSR for Community

Community Engagement is one of the key pillars of CSR, as already mentioned earlier in this chapter. It is usually the best and easiest option for SMEs to engage in CSR activities and the CoOp research on Youth organizations and SMEs cooperation showed that SMEs owners are primarily interested in providing support -financial or in-kind - to projects which benefit the local community. The reason for that is very obvious, SMEs usually have a local reach, their customers and employees are from the local community and therefore it makes good business sense to get involved in community-based CSR activities: local customers are an important source of sales, so demonstrating commitment to the community can improve the company's reputation, which also makes it easier to recruit and retain employees. Moreover, it can also help to build up a good relationship with local authorities, which is essential in order to receive local contracts. Community involvement is seen by many companies as what is called 'cause-related marketing', where through showing support for a certain cause you are able to positively influence your sales. CSR can also be used by companies, and especially SMEs as a HR tool to increase the employees motivation/integration and attract new talent, as they cannot provide that much upward mobility opportunities, as larger companies. Therefore, getting involved in Community CSR can take many forms for a business. For example a business can choose to:

- Sponsor local events through in-kind or financial donations, e.g. for a local school community picnic.
- Support through employee volunteering, e.g. ask employees to engage in a sport tournament with Youth from foster care; clean up a local park together with young people or set up a school garden.
- Organize an employee gift/financial collection within the company to support a certain cause, e.g. supporting young mothers from a women's shelter.
- Provide the physical space for Trainings or other events, e.g. allow a local Youth organization to use the meeting rooms of a company for their internal meetings/Trainings.
- Provide internship opportunities, e.g. for young people from disadvantaged backgrounds.
- Provide project funds to employees who want to support a certain cause as a group, e.g. organizing a summer camp for Youth from rural areas.

The above provide a list of possibilities on how a company can support their community. However, as the main purpose of a company is not to organize and lead community projects, a partnership with a local NGO will allow the company to take advantage of business benefits while allowing the NGO to follow its mission. Therefore, for community focused CSR company engagement a partnership with a NGO partner is advisable. Examples, of best practice cases showcasing SME/NGO partnerships can be found in the [CoOp Best Practice report on Youth organizations and SME cooperation](#).

As already mentioned earlier CSR as a term is used by business entities rather than the NGO sector, and we must bear in mind that CSR can be a lot more besides a company's community involvement activities. However, it is community involvement that provides the most opportunities to build a cross-sector partnership for Youth organizations. From the NGOs' standpoint, partnership building with the business sector is often termed Fundraising. The term Fundraising means the collection of funds, in-kind contributions or even voluntary support for social causes. Therefore Fundraising involves more than just the collection of funds and this will be explored in detail in chapter 5 of this Toolkit.

Resources:

<http://mallenbaker.net/article/clear-reflection/definitions-of-corporate-social-responsibility-what-is-csr>

https://ec.europa.eu/anti-trafficking/eu-policy/guidelines-non-financial-reporting_en

<https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

<http://www.waynevisser.com/tag/3ps>

<https://www.nytimes.com/1970/09/13/archives/a-friedman-doctrine-the-social-responsibility-of-business-is-to.html>

https://ec.europa.eu/europeaid/communication-commission-concerning-corporate-social-responsibility-business-contribution_en

https://coop.norsensus.no/resource/uploads/2018/08/CoOp-Comparative-Report_.pdf

Logan, David, Delwin Roy, & Laurie Regelbrugge, (1997) Global Corporate Citizenship - Rationale and Strategies, The Hitachi Foundation, New York.

Kilcullen, M. and J. Ohles Kooistra: 1999, 'At Least Do No Harm: Sources on the Changing Role of Business Ethics and Corporate Social Responsibility', Reference Services Review.

Kotler P., Lee N., 2005, Corporate Social Responsibility, USA: John Wiley & Sons
Freeman, R.E. (1984) Strategic Management: A Stakeholder Approach. Pitman, Boston.

Abrahamsson, A. (2006) Sustainopreneurship – Business with a Cause. in Science for Sustainable Development – Starting Points and Critical Reflections, Uppsala.



Workshop Scenario:

CSR in Business – the what, why and for whom

Recommended size of the group: 9-25 persons (the amount of participants influences the split in groups)

Time: 120 min

Materials needed: flipchart (better if two, or divide the paper in two parts for step 2) , flipchart paper, markers, A4/A5 colored paper, sticky tape, projector with speakers and computer for showing short movies.

Workshop's objectives:

Allow the participants of the workshop to:

- Gain an understanding on what CSR is and why companies engage in it.
- Gain an understanding on why it is becoming increasingly crucial for companies to engage in CSR activities.
- Gain an understanding on what good reasons to engage in CSR also apply for SMEs.

Preparation: Read the theoretical part of Chapter 1 on CSR



Presentation:

1. Write down on the flipchart the term “CSR” by writing out on what each letter stands for (Corporate Social Responsibility)

In other words this term implies that CSR stands for “Business has a social responsibility”!

2. Ask the group what they think about this? Why should companies take responsibility? Why should not only governments and NGOs take responsibility?

Allow for discussions in small groups (min 2-max 5 people per group) each group should be able to state some reasons for yes and for no. They can write down the reasons on flipchart paper. Let the first group provide their reasons for and against, and write down the reasons on flipchart. Ask the next groups to mention on what they would add. [10 min]

Given that there are reasons for and against engaging in CSR, why do an increasing number of companies engage in CSR activities?

Connect this point to profit maximization versus Stakeholder Theory and show a short video with explanation of Edward Freeman: <https://youtu.be/bIRUaLcvPe8>

Make sure the participants understand that most of the companies now follow the Stakeholder approach. It is proven that companies that provide value for society are actually doing better. Here show another short video to illustrate that:

<https://youtu.be/ypWDdFrRIVQ>

What other reasons did you hear from the video on why companies should act responsibly? Make sure the participants also mention sustainability issues here. You can mention information about the SDGs and the fact that companies have the responsibility to contribute to the realization of those goals.

During the discussion, add more reasons to the flipchart on why companies should engage in CSR activities. [25 min]

3. Having developed this list together around why companies should engage in CSR activities and having also talked about the “global issues” that companies are expected to help solve... How does this relate to SMEs? What reasons do you see for SMEs to engage and develop CSR activities? Provide a definition of what an SME is:

“Small and medium-sized enterprises (SMEs) are non-subsiary, independent firms which employ less than a given number of employees. This number varies across countries. The most frequent upper limit designating an SME is 250 employees, as in the European Union. However, some countries set the limit at 200 employees, while the United States considers SMEs to include firms with fewer than 500 employees.” (<https://stats.oecd.org>)

In groups, write down possible reasons why SMEs should and would engage in CSR (min 3-max 5 people per group). Each group writes down one reason on one colored paper each [10 min]

Ask the first group to present their reasons by sticking each paper to a wall. The following groups state their reasons and if they are the same as the ones mentioned by an earlier group, group the papers on the wall together. [10min]

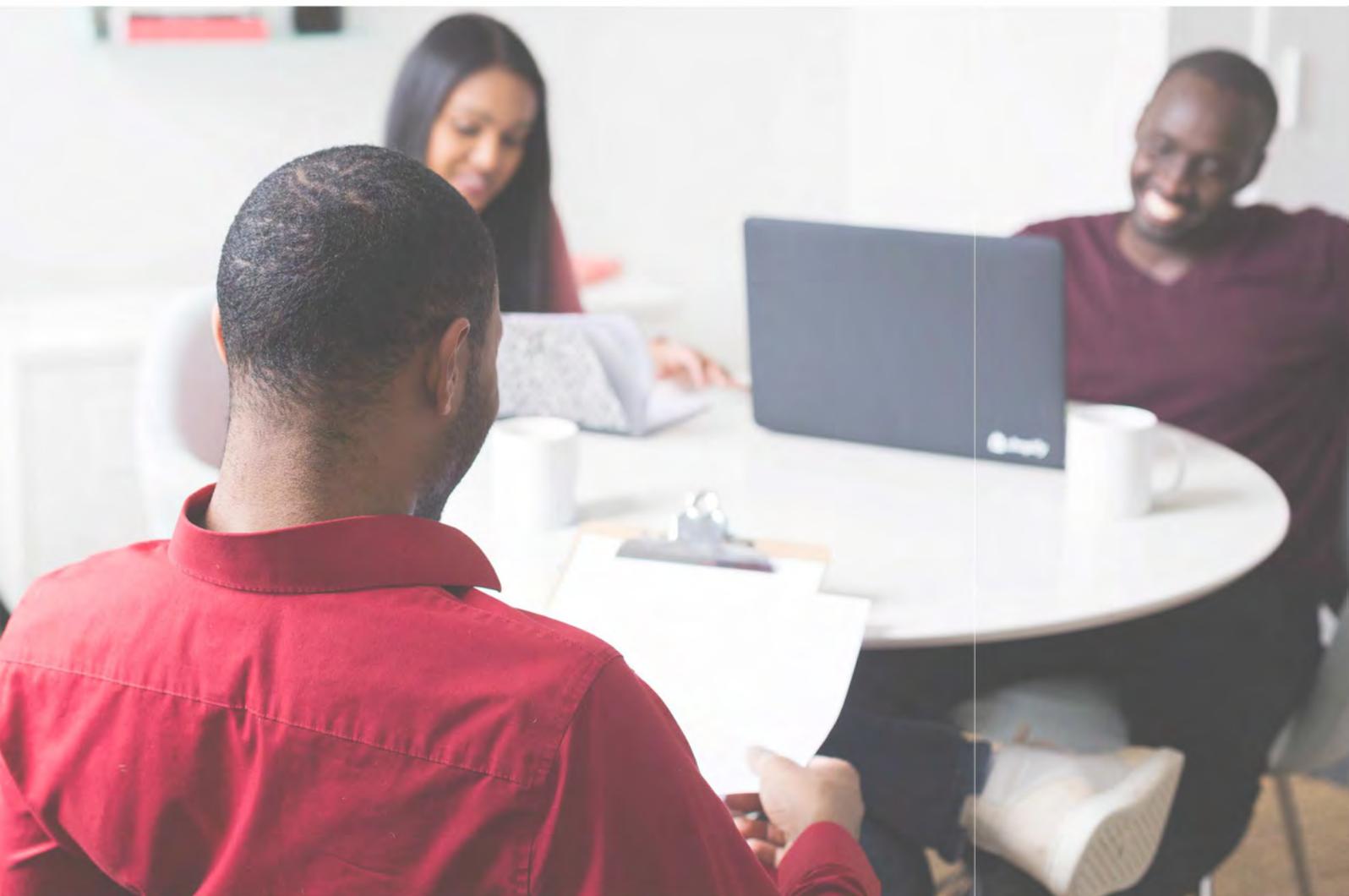
The trainer now shows the reasons developed earlier in step 2 and compares them with the ones provided for the SMEs. The group is being asked to reflect on the results, discuss differences and similarities or/and new points added. The Trainer should also emphasize here that one needs to understand that the reasons for why a company engages in CSR cannot purely be cause-driven but that it also need to have the economic-profit making interest of the company and its owner in mind. [20 min]

4. Having discussed the reasons that companies, large and small, should engage in CSR- provide now the definition for CSR. Ask the group if they agree with the definition.

Provide the definition of the European Commission and ask the group on what areas a company can have an impact on.

Provide the information that CSR impact can be grouped in 4 main areas: See 1.1 Areas of CSR impact. Draw the figure on the flipchart and explain each area. [10 min]

Ask the group what ideas they have on how an NGO could support a SME to take part in CSR activities in each of the areas. Another approach here could be to provide written examples for each of the 4 areas and ask the groups to match them, followed by a presentation of results. [15-30 min]



Chapter 2:

Build your CSR Potential

In this section we examine the motivating factors for Youth not-for-profit organizations in seeking support from businesses in general, and SMEs in particular, as well as any reservations NGOs may have.

We first look at general reasons to want support from the private sector, and more specifically at what the NGOs we spoke to in our research said would motivate them to do so. They also described what an ideal SME partner looks like, and in which manner they prefer to work together with SMEs: types of projects, relationships...

We also examine the ways in which larger corporates and SMEs vary in terms of how they tend to engage with NGOs. We look at the positives of how different sizes of companies can fulfill the needs of Youth NGOs. We also examine the challenges associated with CSR and the fears that many NGOs feel around getting started with it.

In the 2nd part of this chapter we provide steps and tips on how to get your organization ready to get involved with the business sector. Because Youth not-for-profit organizations often struggle to obtain all the funds they require to run their projects, there is an obvious motivation to find support in the business sector, however what is often lacking is the inner organizational readiness to do so. Processes, tools and relevant knowledge need to be developed and agreed within the

2.1 Why would Youth NGOs get involved with SMEs?

Findings from our national research reports, and summary comparative results

In the Comparative Report written as part of this Project, looking at the data from the five countries, the reasons Youth NGOs reported wanting to work with SMEs fell into 3 broad categories:

- firstly, the organizations would like to get business support in providing internships, apprenticeships, and working opportunities or scholarships for young people;
- secondly, the organizations would like to get support in developing the capacity of the organizations themselves and their staff and volunteers (Training, expertise, know-how, learning materials, equipment, etc.);
- finally, the organizations would like to get financial support from SMEs to provide current or new activities for young people (activities or projects that focus on personal and professional development for young people, leisure and social, or sport activities, career counselling, etc.).

This was quite consistent even though the NGOs we surveyed varied a great deal in terms of size and focus/areas of activity. Also we must note that in some of the countries the NGOs receive a lot more public funding than in others.

When asked to describe the “perfect SME partner”, there were three areas that the Youth organizations from the five countries have in common:

- firstly, they are all interested in working with companies that leave behind the business/for-profit agenda, and commit to strategic, long-term partnerships with the Youth organizations;
- secondly, the Youth organizations consider that a perfect business partner will share the values of the organizations, believe in the missions of the organizations, and be interested to seriously engage in the work with young people;
- finally, the perfect business partner will be honest, transparent and open to the Youth organization partner.

Also, a common pattern for Youth organizations from Greece, Poland and Romania was that the Youth organizations would like that the partner companies to show flexibility and adaptability when working with the Youth sector.

In our Comparative Report, most of real live projects mentioned by the Youth organizations from the five countries focused on the following areas:

- firstly, the organizations received the help of the companies’ staff, who volunteered in activities which directly involved young people, or in supporting activities (Training for staff, painting, cleaning, organizing Youth centers, know-how & expertise in specific fields, such as IT, etc.);
- secondly, the Youth organizations received financial or in-kind support from the SMEs in organizing special events (galas, festivals, sport events, public picnics, conferences or workshops, etc.);
- finally, the Youth organizations received grants from the companies to implement specific projects dedicated to young people.

We saw some interesting findings, in particular that financial support is really not the only or the primary need; this is positive as in many countries our research showed that SMEs preferred to give time, skills or goods.

It was also clear that NGOs look for partners who share their values, who are open and honest, and who are willing to commit long-term. While the latter can be challenging for many SMEs, for the most part these views are encouraging as SMEs also seem to wish to base their CSR on shared values.

2.1.1 CSR with SMEs compared to Large Corporates - the pros and cons

Motivations and challenges for NGOs to get involved with businesses of different sizes

NGO Needs/Motivations	Large Corporates	SMEs
<ul style="list-style-type: none"> ● Financial (businesses are often more flexible than public funders in terms of how to spend, this makes them attractive donors) 	<ul style="list-style-type: none"> ● The amounts that the business can afford to give are greater ● Their CSR expenditure is much more strictly monitored and decisions take longer to make 	<ul style="list-style-type: none"> ● Potential amounts donated are smaller ● Decisions are made quicker and there is likely to be much less reporting required and less strict criteria for spending
<ul style="list-style-type: none"> ● Sustainability through communities and networks 	<ul style="list-style-type: none"> ● A large corporate donor or supporter is great and can provide sustainability for the duration of the programme as they are sometimes willing to sign up for multiple years ● However if/when this stops it leaves a huge gap 	<ul style="list-style-type: none"> ● SMEs cannot give as much and are rarely willing and able to pre-commit over time ● However a portfolio of many smaller donors is a good way to spread risk and minimize the shock of losing a funder
<ul style="list-style-type: none"> ● Learning from the business sector, in terms of business management 	<ul style="list-style-type: none"> ● Large Corporates and Youth NGOs may not relate to each other so easily nor do they share the same issues and concerns 	<ul style="list-style-type: none"> ● Unless a Youth NGO is extremely large, which is rare, its size, structure and concerns are more similar to that of an SME
<ul style="list-style-type: none"> ● Need for other expertise at low or no cost 	<ul style="list-style-type: none"> ● Some large CSR Programmes focus on pro-bono work and can be very useful. ● They can afford to give more time and sometimes pay for resources or materials needed for the project 	<ul style="list-style-type: none"> ● Some skills are mainly available in SMEs (ex: graphic design, printing, building repairs, law...) ● But the time and budget an SME can allocate to this will be smaller.
<ul style="list-style-type: none"> ● Voluntary Board Members 	<ul style="list-style-type: none"> ● Prestigious but in high demand and less accessible to ask 	<ul style="list-style-type: none"> ● More accessible to ask, less likely to already be too busy

NGO Needs/Motivations	Large Corporates	SMEs
<ul style="list-style-type: none"> ● Creating opportunities / broadening horizons for Young People 	<ul style="list-style-type: none"> ● Any size of company can provide work placements or Training but, like with other large scale CSR, it can take a long time to set up ● Employability Programmes are quite popular with large corporates but they are less aware of or interested in other types of Youth work 	<ul style="list-style-type: none"> ● In smaller towns and rural settings it is unlikely there will be large corporates to approach ● It is easier and quicker to organize on this scale than in large corporate CSR Programmes ● NGOs can put forward their ideas & are not limited by pre-existing CSR policy goals
<ul style="list-style-type: none"> ● Lack of a shared language 	<ul style="list-style-type: none"> ● More likely to have a strong corporate culture, jargon and rules around CSR (and generally) 	<ul style="list-style-type: none"> ● More likely to be on more common ground though not always
<ul style="list-style-type: none"> ● Getting an 'in' can be difficult 	<ul style="list-style-type: none"> ● Both the preliminary research and the approach process can take a long time 	<ul style="list-style-type: none"> ● It is usually a quicker and simpler process to find and contact the right person
<ul style="list-style-type: none"> ● Short of time and resources to approach companies 	<ul style="list-style-type: none"> ● The meetings, discussions and negotiations are usually slower and more complex ● On the plus side though there is a dedicated CSR contact person or team 	<ul style="list-style-type: none"> ● It is also usually much quicker to get a decision and start the project
<ul style="list-style-type: none"> ● Ideological clashes... values may not align 	<ul style="list-style-type: none"> ● This is often more a perception of the 'other side' than a reality. Many business people are genuinely interested in helping ● Even if they are not, there are often common goals to be reached through CSR even if the two parties have different agendas 	<ul style="list-style-type: none"> ● Typically SMEs are less interested in PR/marketing/branding from their CSR, than large corporates ● They are more often really connected into and interested in their local community
<ul style="list-style-type: none"> ● Fear of not being able to say no 	<ul style="list-style-type: none"> ● No matter the size of the company, NGOs need to be clear on their goals and what they are or are not willing to get involved in. 	<ul style="list-style-type: none"> ● Same no matter the size

NGO Needs/Motivations	Large Corporates	SMEs
<ul style="list-style-type: none"> ● Measuring impact and reporting can be difficult 	<ul style="list-style-type: none"> ● Large CSR Programmes are more demanding around reporting and stricter in their criteria ● But, measuring impact is to be encouraged 	<ul style="list-style-type: none"> ● SMEs are less likely to request formal reporting ● They are also usually less prescriptive about how their support is used
		<ul style="list-style-type: none"> ● Nonetheless it is recommended to do some reporting for all donors

These charts are not exhaustive but give a sense of how parameters vary between companies of different sizes. NGOs should consider these factors before targeting businesses to suit their projects.



Workshop Scenario:

Youth Project Needs Assessment

Recommended size of the group: 12-15 people

Time: 45 minutes (this is tight so keep the projects simple and the number of groups small)

Materials needed: flip-chart paper, markers, post it/sticky notes

Workshop's objectives:

Learn to identify your needs for CSR engagement with SMEs

Preparation:

The Trainer should prepare one flip chart paper with the table below drawn as an example Ask the participants to read the theory about Needs Assessment below (give them printed copies) or better, present it to them, but also give a paper copy for them to refer to later. [5 min]

THEORY

What is a Needs Assessment?

As per Wikipedia 'A needs assessment is a systematic process for determining and addressing needs, or "gaps" between current conditions and desired conditions or "wants". The discrepancy between the current condition and wanted condition must be measured to appropriately identify the need.'

It originally came from the Training and Education Sector and was developed to help assess Training needs in organizations, however the same approach can be used to evaluate other needs or in other words, 'gaps between what an organization has and what it needs or wants'.

It can therefore also be called a Gap Analysis or even a 'capacity development analysis' and would often follow a SWOT (Strengths, Weaknesses, Opportunities & Threats) analysis for the coming period if one is working at the whole organization level. Here for the purpose of learning the methodology we keep it to one simple project.

This exercise has many benefits but in particular it

- Prevents projects from failing due to insufficient resources
- Builds capacity
- Maximizes the allocation of available resources
- Focusses the staff and volunteers on what is required to achieve the goals

Presentation

1. Split your group in teams of 3-5 participants (try to have 4-5 teams, but not more than that)
2. Ask each group to select one simple project idea to focus on, that will need funding or in-kind help. They should define the project goals, keeping them realistic and achievable. They need to define the period too - is this for a one-off event, or for a multi-annual project... (for example: deliver an after-school club for 20 children, starting from scratch; or set-up music lessons for 5 children who cannot afford to pay for them; set up a hangout area for teenagers in your center...). It is good if this is a real project happening in one of their NGOs. [5 min]
3. Ask them to each describe their project and write each down at the top of a flip chart paper for later. [5 min]
4. Ask them to create a table with 3 columns on flip chart paper as follows:

	Cash	Goods and Services	Help in time or expertise
Total needed			
Already have (or will receive for certain)			
Need to ask businesses!			

5. Using sticky notes, they should record what resources they need:
 - What is the cost of things that must be paid for? - one sticky note for the cash amount
 - What is required in terms of goods and services? - one sticky note for each item or service
 - Do you need any expertise you don't currently have or more manpower? - one sticky note for each different type of help required
 Place the notes in the first line 'needed'. [5 min]

6. In the second line, they must document on sticky notes the resources that they already know for sure they are getting for that period, in the same 3 categories:

- Funding (include 'restricted' funding ONLY IF it is applicable to this project, plus any 'unrestricted' funding that could potentially be allocated to it). Check if they know the meaning of these terms
- In-kind support such as free goods and services already secured (including those assigned to this project already, or ones that could be re-assigned to it)
- Skills volunteering ('expertise') AND/OR non-skilled volunteering ('time'), depending on what they need, that people already promised the NGO (for people's time, recommend that they take into account the fact that people change their mind and drop off, so be conservative here and try to 'firm up' the promise ASAP)

Place the notes in the second line.

The last line shows the difference, in other words, what resources are missing? What do they need to go and get from companies? What is the funding gap? What is the in-kind gap? What do you need to obtain to reach our goal?

[10 min]

7. Ask each group to feedback, showing their chart paper to everyone. [10 min]

Workshop Scenario:

From Needs to Asks

Recommended size of the group: 12-15 people

Time: 30 minutes (45 min is better if you have time - step 7 is optional: add or cut out)

Materials needed: flip-chart paper, markers (small stickers like dots optional)

Preparation:

Have completed scenario 1

Tell the participants the little bit of theory below (include it also on your handouts) [5 min]

THEORY

Now that you have identified your gaps in resources, be they funding, in-kind or people's time and expertise, one needs to refine this and turn it into a list of 'asks'.

Why do all of this?

These steps break down the resourcing needs into specific asks so that one can start to

- Visualize what is involved in the ask (time, complexity, likelihood of success...)
- Prioritize the asks and potential targets
- Stay realistic
- Start to think about who will take on the ask. It is great to collaborate with SMEs and look for more support but one needs to be mindful of the workload and make sure staff can fit this into their work plan or are happy to do it as extra work, before relying on it on it to fund the projects. If not, one must engage the Board and volunteers instead/as well, thinking ahead also about the time required for follow-up and relationship building with the SMEs.



Presentation



1. The groups and the project ideas remain the same as scenario 1
2. Each group already has the table with the sticky note about the cash need, another list of notes which includes all in-kind supports, and a set of notes for support from persons.

Ask them to look at their Needs in a more strategic way now, not just 'we need €10,000 and we only have €3,000 so we need to find €7,000' but look at the needs that can be fulfilled by alternative means: can they have volunteers make things, get free or reduced good and services, get pro bono advice...

They should note anything that could be fulfilled by in-kind support rather than cash, particularly if the research showed that in their country SMEs give in-kind support for preference. This exercise might result in new sticky notes being created, or some of them might be moved! [5 min]

3. Evaluating the asks in terms of importance and difficulty:

- If it looks like a lot of asks they should grade them in terms of importance between 'must haves' and 'nice to haves': mark the 'must haves' with a dot in the corner of the sticky note (or just draw a dot)

- They should look at which items look easiest to achieve, in particular checking if any of them are a good fit for an existing donor or contact. Of course there is no guarantee but on balance these asks are likely to take less time than if the NGO needs to Profile and Prospect donors from scratch. If there are a lot of local firms in the relevant line of business, again this will make the process easier and quicker than if they have to look further away from the local community: mark those with an E in the corner of the sticky note [total 5 min]

4. Ask our teams to now think about who can assist them with these asks. Maybe some Board Members and volunteers can help because they have more contacts or more time available than the NGO staff? Get them to write their names and job titles on the sticky note.[5 min]

5. **OPTIONAL EXTRA STEP** *if you have more time - allow an extra 10 minutes*

Now ask them to look at the timescale of the activities you need these resources for. When do they need them by, and highlight the urgent ones. They should also:

- make a note of the likely lead time (for example, even after getting agreement for a design and printing SME to produce leaflets for free – allow time for said design and printing to happen, bearing in mind that pro-bono work will not always be performed immediately as paying customers will take priority)

- go even further back and calculate when they should start asking potential donors (not all prospects will agreed to give so they need lead time to ask several of them, meet a few, go forward and back over the ask etc.)

6. All teams report back - [10 min]

2.2. Get your organization CSR ready

A non-governmental organization has a specific organizational culture. Graves (footnote: The Never Ending Quest: Clare W. Graves Explores Human Nature) describes this culture as "Green". Its metaphor is "family". The determinants of this culture are: good atmosphere, lack of hierarchy, spontaneity. According to Graves, the culture of a company (including SMEs) is "Yellow" and its metaphor is "machine". Its characteristics include rivalry, procedure, profits. How to prepare your own (NGO) "green" team to meet and work with another culture, the "yellow" culture of business? How to create appropriate rules and standards that will help us in cooperation with business?

Here we present the most important elements that help to strengthen the NGO team's competences in relation to being a partner for businesses.

Three things are significant here: the organization's knowledge of CSR, knowledge of the organization's strategy (why we work with business), and the competence of employees. Key competencies to be developed in a team in this respect are: oral and written communication, working standards, presentation and moderation skills, and a focus on results.



Step 1:

The leader of the organization communicates the strategy

The organization leader, the board of management or the people responsible for the development of the organization, should describe to the whole team what role the cooperation with business plays in the operation of the organization. A lack of awareness of the significance of the partnership with businesses, could cause the NGO employees/volunteers to attach all the importance to their work with beneficiaries and treat the cooperation with businesses as a much less important task.

Tips: Hold a meeting with the team. Remind them of why you need business partners and what benefits this can bring. Describe these partners (SME companies). Indicate those who are most important to us. Show what this cooperation may look like and what CSR is about (see chapter I).

Step 2:

The organization sets communication standards

Communication standards are the basis for good communication with business. Lack of standards causes the business to withdraw from cooperation or forget about arrangements and obligations (it is not its priority, after all).

Tips:

Define what a memo, a phone call or a meeting should look like - show an example. Define how to archive documents and presentations related to a given business partner (which specific folder, and its location). Determine the time (guaranteed) in which we reply to the business partner's e-mail. Determine who to CC when we write to the business partner.

Step 3:

How the presentations and documents sent to business should look.

Business decision-makers have little time for reading documents. Therefore, whatever we send them should be legible, brief, well thought through and relevant to their needs.

Tips:

Set a presentation layout - one for all presentations (specify the size and color of the font, logo of the organization, the last slide - containing information about the organization and the contact person). Determine what a cost estimate or a table or an Excel document should look like. Specify that all documents and presentations must be sent in PDF format only, unless we edit them with the business partner. Specify the manner in which we save the names of individual documents (e.g. do we include the date and name of the partner?). Decide on the quality and source of photos that can be pasted into presentations.

Step 4:

Role division

It is desirable that the business partner contacts one representative only in the Youth organization. The employee chosen should get to know the business person with whom they work and build a long-term relationship with them. They should be in charge of all communications with the business partner and ensuring its consistency.

Tips:

Write down the scope of tasks and responsibilities for the person working with the business (or add to their current scope of tasks). Schedule a 1:1 briefing to discuss progress and challenges in collaboration with the partner. Determine the level of autonomy in decision-making for this person and in developing a strategy together with a given partner.

Step 5:

Set a format of reporting to the business partner

Each company has a different standard and needs related to reporting on cooperation with a non-governmental organization. It is a good idea to prepare your own organization for various forms of reporting. The Management Board of the organization should discuss how to measure the effectiveness of the organization's activities and how to show it to business partners.

This is a very important element of the evaluation of the cooperation, especially with larger organizations. Small companies may expect a different type of report or communication. It is worth establishing first what we can offer here as an NGO, before making a commitment to a business partner. It is risky to undertake a system of evaluation or a form of communication for which we do not have sufficient manpower or the relevant methodology/technology.

Tips:

Determine what our options as an NGO are (Making a film for the business partner with a phone and editing it attractively? Creating attractive infographics? Making presentations with quotations from beneficiaries and photos of the business partner? Running tests to measure growth in the area in which the business partner is involved?). Determine how much time and budget we can spend on reporting - e.g. do we have appropriate technology or skills. Set a schedule for preparing reports so as not to leave it until the last minute. Determine who is responsible for preparing the report.

Step 6:

Value added for the team – motivating and appreciation

NGO employees often find that cooperation with business is a big challenge and requires different competencies than working with a direct beneficiary of the NGO. This requires the leaders/managers to value and strengthen the required attitudes and behaviors. Showing appreciation to the employees and teams for good reports, successful meetings and the promotion of quality cooperation with business all help to model the change in the standards and culture of the organization itself.

Tips:

Thank and give feedback for every good quality action (reports, presentations, meetings). At team meetings, appreciate employees for their cooperation with a given business partner. Celebrate the successes of such cooperation.



Workshop Scenario:

Moderating an effective team meeting on cooperation with a business partner

When to use it:

- How to effectively and creatively conduct a team meeting concerning cooperation with business
- How to involve the team in cooperation with business
- How to be a good moderator of meetings inside the organization and create good standards of internal communication

Materials: flipchart paper, markers, movable tables, Blu Tack.

Additional Information: Number of people up to 15
Time 60 minutes

Presentation

1. Divide the group into 5-person teams to sit at 3 tables. If there are more people, divide the group into more teams.
 2. Ask each group to answer the question of what makes meetings ineffective and tiring. Ask them to write down these indicators on flipcharts and to hang them on the wall next to each other. [preparation time: 5 minutes]
 3. Ask for answers (The presenter comments briefly, highlights the main problem that repeats as a challenge during meetings and asks follow up questions when something is unclear) [5 min]
 4. Ask the teams to agree (separately) on 6 important rules for an effective meeting and write them on flipcharts. [10 min] Again there is no presentation just hanging up the flipcharts.
 5. Show and give out handouts - Rules for an effective meeting (see Attachment 1) and check if all the points are listed on the flipcharts. Comment on and appreciate the work of the groups. [Time: 10 min]
 6. Practice - Ask each team to choose a moderator who will lead part of a meeting on how we can attractively and innovatively inform and report to business about our activities (projects in which a given business participates financially, or in-kind, or by volunteering). Suggest that the moderator uses a brainstorming technique and each participant proposes his or her own idea. [Time: 10 min]
- Here you can find rules for brainstorming sessions:
<https://blog.aweber.com/email-marketing/10-rules-for-mind-blowing-content-brainstorming-sessions.htm>
7. Ask the teams to present their best ideas. [Time: 3 minutes per group. Including questions from participants: 15 minutes]
 8. Ask the moderators what helped them and what made it difficult to hold the meeting. Appreciate the moderators for the activities selected. [5 minutes]
 9. Give thanks and appreciation to the whole group, collect the materials, assemble them into one document and send out to the participants.

Rules for an effective meeting:

1. Set the date and duration In advance
2. Invite everyone (email, calendar)
3. Start punctually, ask the participants to switch off their mobiles
4. Chose one person for taking minutes
5. Set 1-2 key objectives for the meeting
6. Sound out the participants – obligatory round – what topics that are important for group analysis or that are relevant to the objective of the meeting do they have (write them down on the flipchart)
7. Communicate your message - specifically and concisely
8. Moderate a short discussion on selected topics (related to the purpose of the meeting and the topics suggested by the participants)
9. Navigate towards making decisions on or finding solutions to selected problems
10. Determine who is responsible for each specific task - together with the deadline
11. Determine when you will deal with topics that could not be discussed at this meeting
12. Allow some time for a casual discussion
13. At the next meeting, ask for the minutes from the previous meeting to be read out
14. Hold regular meetings at the same time for no more than 30-40 minutes



CHAPTER 3:

Understand and learn more about SMEs as partners

Before going in developing meaningful partnerships with Small or Medium Enterprises (SMEs), it is essential to understand their way of operating, their motivations to get involved in community projects, and the challenges they face in getting involved and while implementing projects in partnership with NGOs/Youth organizations. This chapter presents a general image of SMEs, providing more understanding for Youth organizations and Youth workers on SMEs' motivations and challenges in being involved in community projects. Also, this chapter introduces relevant knowledge around the profiling process that each Youth organization/NGO should undertake to learn more about their potential business supporters, before approaching them to develop partnerships. The chapter presents relevant theory on these topics and also workshop scenarios, which could be used to train Youth workers or other NGOs staff about the SMEs' perspective on community projects and about the prospect-suspect-donor process.



3.1 Understand SMEs' motivations and challenges in supporting Youth organizations

The CoOp National Reports' (2018) literature review clearly indicated that in contrast to the extensive research concern the CSR activities of Large Corporates, there are very few studies to be found on SME/NGO partnerships, or even on SMEs and CSR activities in general.

In the field research completed by the CoOp partners, an attempt was made to fill this gap, and the results indicated a number of specific characteristics when it comes to SMEs' CSR involvement.

Specifically, we found that unlike the trend in Large Companies, most of the SMEs interviewed for the CoOp research (with the exception of a few at the larger end of the spectrum) did not use the term CSR to define or describe the support they provide to different causes, projects, non-profit organizations, public institutions, church or specific humanitarian causes; rather, "getting involved", "supporting", "giving back", "donating", "sponsoring" were the terms used by the SMEs' representatives.

Furthermore, their projects and their activities have a definite local focus, meaning that the SMEs are more interested in supporting their local communities; they do not usually have a CSR or philanthropy strategy, nor do they have dedicated staff to take care of these activities; and the cause to be supported is selected mostly based on the interest, need or personal motivation of the SME owner or the senior managers within the staff team; also it usually depends on the NGO that is asking, on its reputation or who the recommendation came from with the SME's stakeholders network.

Another key finding was that SMEs were interested in developing long-term partnerships with trustable and accountable organizations, with clear causes, objectives and evaluated outcomes. Also, they stated that they prefer working with organizations that can demonstrate immediate and visible impact over the community, and/or that can provide some return benefits to them with regards to their employees, clients or business partners.

3.1.1 CSR Benefits for SMEs

Benefits derived from getting involved in community activities can be numerous. However this doesn't mean that SMEs can immediately see or understand the benefits of such collaborations, or that they are fully aware of these yet. However, as mentioned above, even without knowing the term CSR, many SMEs do partake in CSR 'instinctively'.

In any case, promoting these possible benefits can enhance SMEs' motivation and be the starting point of building collaboration between Youth organizations and SMEs.

Most of the existing published studies, including the CoOp Comparative Report (2018), indicate that a wide range of benefits can be gained from community involvement. A list with such benefits follows:

Benefits of CSR for SMEs

- Character/values of owner: meet the owner's need and/ or interest for giving back to the community.
- Business reputation, marketing, increased visibility: expand or improve their SME's reputation and image through the promotion and dissemination of the SME's activities and its social role to a broader audience which may include potential clients.
- Recognition: getting recognized as an actor who works for the benefit of their community.
- Expectations of community: meet the expectations of their community as a responsible and socially sensitive enterprise.
- Increase employee morale: there are not many upward mobility possibilities in an SME, therefore for an SME community involvement can be used as an HR tool to provide the employees with a feeling of purpose. Something additional to the everyday work they do, that allows them to feel proud of the company they work for.
- Business profitability: increase their profits, e.g. by forming new synergies thanks to their new reputation, etc.
- Access to information: increase their sources of information by expanding their network.
- Increase trust and legitimacy with specific stakeholders (suppliers, customers, employees and local community).
- Long-term survival: ultimately, all of the above can enhance the SME's sustainability and strengthen its position against competitors. Building more connection with their community through CSR can in return generate the support of the community towards the SME in times of crisis, for an example by buying goods from the local SME instead of a large enterprise (Supermarket chain), etc.

3.1.2 Challenges

There is a number of challenges that the people in charge of SMEs might face when it comes to their CSR involvement and cooperation with a Youth organization. These factors can really hold SMEs back from getting involved in such activities. Thus, it is crucial to address and overcome these in order to build sustainable relationships. Three main issues were pointed out in the CoOp Comparative report (p.19):

3 ISSUES TO BE SOLVED IN PARTNERSHIP

BETWEEN NGOs AND SMEs

THE ISSUE	Youth organizations current perspective	SMEs current perspective
1 Support needed versus offered	They need mostly financial support from SMEs.	They prefer to give mostly in kind support or to volunteer for the cause they choose. The financial support is limited and less preferred.
2 "The perfect partner"	They prefer to work with companies with CSR/philanthropy strategy and/or with dedicated staff for this activities.	Most of the SMEs do not have a CSR strategy, the decision is, most of the time, personal, based on the interests, needs, and motivation of the SMEs owner.
3 Expectations towards the other sector	They expect companies to be committed to the cause, on long-term, to share the same values, and to be honest, open and transparent.	They expect youth organizations to be trustable and clear about the needs and objectives; and to help in motivating employees, and in better reaching or reaching more clients and business partners.

 CoOperative for Gender

In short, from the SMEs' perspective, in many cases giving in-kind support or volunteering to support an NGO is preferable to financial contribution. Thus, even when an SME doesn't have the capability or willingness to support an organization financially, it may be able and willing to assist in numerous other ways. In such cases, if the Youth organization only looks for financial support, the SME will not respond positively.

Furthermore, as mentioned above, SMEs do not usually have a set CRS strategy or a dedicated function or contact. This can lead to a series of challenges for the SME owner, since he or she needs to spend more time and energy in setting up and running such collaborations.

Finally, another challenge is that there is no platform where SMEs can familiarize themselves with NGOs and their work, to get to know their profiles, interests, objectives and needs, and explore opportunities for collaboration. In some cases there is a lack of trust towards the NGO sector, or at least a lack of understanding, unless a personal recommendation is made.

Resources

Beudean P., Sevincer, V. (2018). Comparative Report on SMEs and Youth organizations cooperation,

https://coop.norsensus.no/resource/uploads/2018/08/CoOp-Comparative-Report_ok.pdf.

European Commission. (2005). The new SME definition. User guide and model declaration, Enterprise and Industry Publications of European Union,

<http://ec.europa.eu/DocsRoom/documents/15582/attachments/1/translations>.

Papaioannou, S., Kristofer Pettersson K. (2012). Corporate Social Responsibility of SMEs during Times of Turbulence - A Case Study of Small and Medium-sized Exporters in a Changing Environment, Thesis, Linnaeus University

<http://lnu.diva-portal.org/smash/get/diva2:538994/FULLTEXT01>.

Pellegrino, D. (2016). CSR disclosure in SMEs: a case study, Thesis, University of Padova,

http://tesi.cab.unipd.it/59329/1/PELLEGRINO_DANIELE.pdf.

Song, J. (2009). Does size matter in doing good: an exploratory study of small businesses and corporate social responsibility (CSR), Thesis, University of Florida,

http://ufdcimages.uflib.ufl.edu/UF/E0/02/46/48/00001/song_j.pdf.

Sen S., Cowley, J. (2012). The Relevance of Stakeholder Theory and Social Capital Theory in the Context of CSR in SMEs: An Australian Perspective, Business Ethics, 118: 413–427, Springer Science+Business Media Dordrecht,

https://www.researchgate.net/publication/257542068_The_Relevance_of_Stakeholder_Theory_and_Social_Capital_Theory_in_the_Context_of_CSR_in_SMEs_An_Australian_Perspective.



Workshop Scenario:

Identifying SMEs' motivations and challenges in supporting Youth organizations

Recommended size of the group: 20-25 people

Time: 60 minutes

Materials needed: flip-chart paper, markers, beforehand printed case study x 5, 6

Workshop's objectives:

By completing this scenario Youth workers will familiarize themselves with the:

- SMEs motivations
- Benefits that SMEs can get from such collaborations
- Challenges that SMEs can face in order to form such collaborations

Presentation:

1. Split the group into mixed teams of 4-5 people in order for all participants to interact with each other and allow them a minute to rearrange their seats as needed [5min].
2. Provide each team with the following case study (CoOp IO2 - best practice) and in the meantime read out loud the intro info: "This is the case of the SME ASSET Technology which is established in Athens, Greece. ASSET works at both National and European level and its main sector of activity is Business Consultancy. This is an interview of ASSET's owner regarding a cooperation with an NGO." [5min]
3. Ask the participants to: "Please read the case study carefully" and set their time limit to 5 minutes.
4. Ask the participants to make three lists: one of the SME motivations, one of the benefits and one of the challenges that they can extract from the case study or think that could have emerged during the formation of the cooperation [10min].
5. Each team needs to present that list (one person per team) and explain their reasoning. While presenting, the Trainer writes down the various points, and if necessary might rephrase them so that all can agree on them (5 mins per team for the presentation, 20 - 25 mins in total).
6. Discuss the results in relation also to the theory [10min].

Attachment

Case study example

SME owner:

Our cooperation was with an NGO working with Youth, which we already knew. We had a previous cooperation under a European project and they approached us for cooperation in an idea they had. Specifically, we facilitated the NGO's plan to establish the Social Cooperative Enterprise (SCE) "Iliotropio" (Sunflower) in which collaborators were: the NGO, our SME and local Municipalities. The SCE aim was to promote young people (male and female) with mental problems to employment as part of the process of their integration, re-integration in the society. Geographically it covered Athens, and specifically the city's north and east part. The results achieved were impressive as the numbers of the beneficiaries were quite high: about 100 Youth found a job!

The initial budget for the SCE establishment has been quite low, at approx. 5,000 euro, and it was covered by the contributions of its members. ASSET bought some contributions. Due to my interest, I have been the first president of this SCE in a volunteering basis. Our total support has been in a volunteering basis, i.e. the administrative part of the organization run with staff from our company, who also worked voluntarily (in the same positions that they were working and getting paid in our company, they also voluntarily worked for the SCE for free). Our support was provided for 2 years at the startup phase of the SCE and lasted for three more years, until the new SCE was able to start functioning as an autonomous organization. Then the SCE managed to get some contracts, such as the cleaning of local schools, and the logic was that the total amount of money that the SCE was gaining to be used only for paying the young beneficiaries. There were not any operational costs or salaries for managers or the administrative staff, as these were all covered by volunteering offers in the context of CSR. The more profit the SCE gained from the services offered, the more people were enabled to work and get paid. As a result more than 100 Youth found a job, indicating the success and the impact of this cooperation.

I am very happy and proud of this cooperation because it was a difficult task since there is high unemployment, lack of in time salaries payments due to cash flows shortages, and because we targeted and support a vulnerable target group such as the Youth with low skills and mental problems. "Iliotropio" started in 2008 and it operates successfully till today, and even if it started due to our personal interest it had an impact in the activities of our SME: we got better visibility as an MSE working in the field of Social Entrepreneurship and gave us the opportunity to develop new collaborations in national and European level.

3.2 Profiling your potential business supporters

The 25 experts in Fundraising, CSR & Youth work, from Greece, Ireland, Norway, Poland and Romania, that were interviewed by CoOp partners in order to develop these Fundraising and CSR resources for Youth organizations and Youth workers, agreed that NGOs should take the time to research and collect information about their 'target' companies/SMEs. According to them, Youth organizations should focus on learning about the donors' needs and interests, the values they share, the common connections or network they might have in order to reach the potential donors, and also the risks and liabilities the potential donors could bring for the organization's reputation in the community, or any other constraints or disadvantages that such a collaboration with a business partner could generate. For this reason, we consider Profiling a key process that Youth workers and Youth organizations should understand, learn and practice.

The process of "transforming" a company into a donor/sponsor for an organization can be explained using crime TV shows. In these shows, for each crime, the detectives start with building a list of suspects, then continue with building the murderer's profile, converting suspects into prospects and, finally, when the evidence is there and there is no doubt left, one of the prospects is identified as being the murderer.

Fundraisers have to implement a similar process in order to get more and more supporters for their organizations. First, they build a list of suspects, then they research and find more information about the suspects ('profiles' are built) and some of them become prospect donors. Finally, when the solicitation is made and there is no doubt over the prospects' involvement in the organization because they agree to provide support, they actually become donors. The process does not stop here however, because fundraisers want to persuade donors to give again, to give more, to give regularly, and to give in many different ways.

Building a list of suspects means thinking of those companies that might be interested in supporting the organization. The list should be filled out by the members of your organization. Ideally, it would be great if everyone, staff or volunteers could fill out such a list. But it is more important to think in term of numbers - how many people companies do you want on that list? And how much support do you need? Typically, two names converts into one good prospect, and four prospects result in one donation. For example, if you wanted to have five new donors, you would need a list of suspects with approximately 40 names. On this list, the fundraiser could add names of local businesses: previous donors or board members, donors who give to similar organizations, vendors, and other companies who might have an interest in the cause or the Programmes of the Youth organization.

As we saw, suspects become prospects when the fundraisers, through specific research and documentation, find out that the suspects are viable in the Fundraising process looking to the following main criteria:

- Their capacity to give;
- Their interest in your organization and their general motivation to give;
- How you can reach them - how connected they are to your organization, what kind of relationship already exists;
- Their personal interests, motivations, hobbies, passions, projects, activities, etc. that you could use to “attract” them and bring them closer to the organization, and in the end to motivate them to support you.

In addition to this most relevant information, a prospect profile should also include:

- Contact information;
- Past history as a donor (how much the company gave before, for what types of organizations/ causes and how often it gave);
- Specific financial information (turnover, profit) and recommendation for the amount of the first solicitation;
- The cultivation required before asking (how much effort should be made to further develop the relationship with the prospect; ideas of activities that could be interesting for the prospect, in order to be used in the cultivation process);
- The best way to ask (face to face, through a special event, an email campaign, etc.).

Information about the prospects can be gathered from many sources such as: people who know them well/personally, from business partners, from media and social media or business magazines, from the companies’ websites, blogs, social media pages, Corporate Social Responsibility guidelines if they have some, from other NGOs, from public institutions or business associations, and from direct meetings with the prospects.

The prospects should then be segmented based on their ability and willingness to give. This segmentation will help fundraisers to organize the cultivation process: there will be prospects that are ready to give at their full potential; there will be prospects that still need some cultivation before making the solicitation; and there will be prospects that need extensive cultivation before asking them to make a gift to the organization. Each of these groups require different methods and strategies so as to nurture relationships.

Resources:

Stanley Weinstein, *The Complete Guide to Fundraising Management*, 3rd edition, John Wiley & Sons, Inc., 2009.

Joe Gareth, *How Many Prospects Do You Need?*, available at:
<http://www.theFundraisingauthority.com/donor-cultivation/prospects/>.
Last time accessed on November 2018.

Workshop Scenario:

Profiling potential business supporters

Recommended size of the group: 12-15 people

Time: 90 minutes

Materials needed: video-projector, flip-chart paper, markers

Workshop's objectives:

- To learn about the suspect-prospect-donor process;
- To be able to profile potential donors.

Preparation:

- Read the theory about profiling;
- Read the case study about Daisler Print House (Romania) from the CoOp project website.

Presentation:

1. You announce to the participants that you will play the role of an SME owner in the following exercise. You will be the owner of a family printing house. You would like to support their projects, and for that you give them the opportunity of an interview with you. Each team will have to prepare 3-5 questions to learn things about your company or about yourself, things that they consider will be relevant to prepare their solicitation of support from the printing house.
2. Split your group in teams of 3-5 participants (try to have 4-5 teams, but not more than that), and repeat the task: prepare 3-5 questions to get information from you so that they could prepare project ideas to present to you later with a request for support/donation.
3. After 10-15 minutes of working in teams, the interviews start. Each group comes in "your office" and starts the interview with you, asking the questions they prepared. To answer the questions, use the information from the case study you read, but you can also improvise starting from the information you can find there. While one team is asking the questions, all the other teams are listening in the forum, but they are not allowed to intervene or to change their questions. You should not allow interviews to go longer than 5-7 minutes.
4. After all the interviews are done, ask the teams to come up with an idea, a project that they think will fit the company and its interests, from their own list of needs. They have maximum 10 minutes to think about the idea, and then one minute to pitch it to you.
5. Each team presents its idea, and you can say yes or no to their ideas. You should elect to say yes to ideas that fit the profile of Daisler Print House, but say no to ideas that do not fit the given profile. For instance, Daisler Print House never gives money, but only in-kind support. So all the projects that come and ask for money will be rejected. Use information from the Daisler Print House case study and present the profile of the company (show them the case study from the CoOp project website).
6. Introduce the theory on profiling, presenting the suspect-prospect-donor process, with a special focus on the profiling, on what information should be collected from your prospects in order to bring them closer to the organization, and then to transform them into donors. Use examples from the interviews (questions that worked, questions that did not work, what else they should have asked).

7. Ask the whole room for ideas as to where they could find information about their prospects, and write them down on a flip-chart paper. Explain that the situation you created in the room is the best case, because an organization rarely gets the chance to meet for an interview with the decision maker and collect information directly from the company, through face to face interaction.
8. Finally, ask each team to go back in their teams and come up with an idea of what they could do, the first step they would take to bring Daisler Print House closer to their organizations.
9. Each team then presents the idea in one minute, and you wrap-up the session, repeating the steps of suspect-prospect-donor process.



CHAPTER 4:

Prepare your organization for better relationships with SMEs

The CoOp research on Youth organizations and SMEs cooperation showed that SME owners are really interested in developing a long-lasting relationship with the NGOs they support. This chapter supports Youth organizations or NGOs working with Young People to learn how to develop their brand, how to build trust and how to ensure transparency; also, this chapter gives practical information on how to pitch the organization's cause and projects to SMEs; it helps NGO workers and Youth workers to think about their projects in terms of key performances indicators and impact, which are the sort of information that is relevant to the business sector; and finally it gives some idea of how to cultivate the relationships with the business supporters of the organizations. Each subchapter includes relevant theory for these topics and one or two workshop scenarios that could be used by Youth organizations to prepare their Youth workers or other staff in developing knowledge and skills to enhance their communication with the SMEs and strengthen the relationships with corporate supporters.

4.1 Build your organization's reputation on trust and transparency

The CoOp Research on Youth organization and SMEs cooperation showed that an organization's reputation and its connections with the community play an important role when companies make decisions to support projects. Through the interviews and focus groups we organized with a total of 51 SMEs from Greece, Ireland, Norway, Poland and Romania we found out what factors are considered important in their decision making process; in more than one country the factors mentioned were: the previous relationship or contact with the NGO (including previous results of the collaboration); personal contacts with the NGO or recommendations made within the personal network of the decision maker, usually the owner (it is a matter of trust); the NGO's capacity to present and implement the project professionally; the good reputation of the organization in the community. As a result of this research we consider reputation and transparency to be the core topics that the CoOp Fundraising and CSR Tools should address, and we developed this chapter and specific scenarios accordingly.

Non-profit organizations' reason to exist is to make an impact. Developing an efficient branding strategy plays an essential role in ensuring impact, building a reputation and contributing to the organizational transparency. You may be surprised or doubtful at this, based on the assumption that branding is more relevant to businesses than NGOs, but actually branding is crucial for a non-profit organization. Especially in an era of fast changing marketing landscape where meaning and connection with the audience is key, taking advantage of branding has become a must for non-profits.

Dan Linn, from Solution Link IMS, points out how NGOs such as the World Wildlife Fund and The Red Cross are widely recognized because they have an incredibly strong brand, such that people from all over the world know what they do and who they are. He notes that brand awareness isn't just for such big non-profit organizations, and that smaller and local organizations can benefit from it too. No matter how big or small, a brand strategy is a key part of making your non-profit more appealing to any potential audience, be it donors, volunteers or partners, making you more visible and impactful.

Before diving into the 'how to' of branding, we need to clarify what we mean by brand. Branding expert Marty Neumeier, mentioned by Matthew Schwartz (The 6 Keys to Effective Non-profit Branding), defines brand as simply "Who you are, what you do, and why you matter. It's not what you say you are, it's what they say you are." Schwartz translates this definition for non-profits as how other people perceive the combination of your mission, values, strategy, relationships, impact – and their value to the world. If a brand is essentially what others think about your organization and through which trust is built, then branding is "the application of creative thinking, design, and technology in the service of your organization's brand strategy", as noted by Schwartz in the same article.

Yet bringing them together and turning them into a strategy is a complex task. Here are some of the most important aspects that should be considered when working on branding for your organization based on Forbes Non-profit Council (2018) and Elisabeth McCumber (2018):

1. What makes your organization special and what makes it unique?

"What's often most difficult lies closer to home: getting internal buy-in from your team during the branding process", suggests Elisabeth McCumber (2018). She formulates this pre-requisite for any branding work: "Clarify your goals, translate your mission into a powerful story, and bring your entire organization into alignment with it." This might be a big task to undertake, but it is a good guideline in helping you to avoid a common mistake many new non-profits make: trying to reflect in their brand what they think their donors or partners want to see and hear. Instead, it is much more important to genuinely showcase why your organization is different from other organizations and to define a brand that speaks of that unique position you have on the NGO 'market'.

2. Consistency

Choose your logo, your slogan, your color, your images, your fonts, etc. and use them all over your printed or online materials, and on your website and all your social media channels. Help your audience to "memorize" your organization's brand, to remember and recognize it, and to make connection between the visual elements you used and the programs you provide. "Every flyer, media outlet and written and spoken content about the organization must be consistent with regards to branding for a new non-profit organization. For example, if you are using a different mission statement and using a different avatar/face/logo on each account with Facebook, Twitter, VolunteerMatch and others, then your message is not consistent", says Anisa Palmer, from I Will Survive, Inc., in the Forbes' article (2018).

3. Authentic voice and user-centric design

Be unique, and make sure this uniqueness, this authentic voice is based on your beneficiaries/clients' voice. You are in the NGO sector because you want to serve specific people from your community. Before developing your brand, connect with those clients, understand their needs, and gain their trust from the very beginning. Then build your brand - from the visual elements to the story the clients will tell about you, based on the information and connection you have with the clients. You could use market research techniques or processes like design thinking to collect information from your clients, but also to connect with them in order to build an authentic and user-centered brand.

4. The impression it makes

What would you like your clients to say about you? How do you want people from your community to remember you and describe you to others, when you are not there, when they are not on your website or on your social media channels? Find the stories and the main aspects you want people to remember about your organization, the impression you want to leave, and use those stories consistently and constantly everywhere.

5. What your brand will look like in the future

"When creating your branding, think five, 10 and 20 years out - not just today. Too many groups choose "cute" brands or ones that won't last the test of time. When branding your new non-profit, you want your brand to communicate what you are about, but it should be flexible enough to grow with your organization", says Tom Van Winkle, from Hinsdale Humane Society, and quoted by Forbes Non-profit Council (2018). Think long-term when developing your brand, spend the necessary time and other resources to build a strong, authentic and user-centered brand.

6. Values

Values are the "core" of your brand. What are the values you want to ground your brand on? What values do you share with your stakeholders? And then, how are you going to make sure these values are embodied in your brand and visible and trusted by your stakeholders? Make sure both the visuals (branding look) and the messages you send out, through any method and at any time, really communicate the values you chose.

7. Simplicity and clarity

Why do you need a simple and a clear brand, both visually and in terms of messaging? It will be easier for you to communicate your mission, projects, results or talk about your clients. However the most important reason to have a simple and clear brand it that it makes it easy for your stakeholders to share your message further in the community. If they can get it, then they can talk about it easily and with satisfaction.

8. How it resonates with your constituents and stakeholders

While you should enjoy and appreciate the brand you are creating and how it expresses your mission, do not overlook how it will resonate with donors, potential partners and constituents. Make sure that is great for you, but it is also appreciated and perceived as great by your constituents and stakeholders.

This Toolkit includes a special chapter with successful examples of real-world case studies and tools used by CoOp partners and other organizations to develop and maintain their relationship with donors, to build the organization's reputation and to ensure transparency in the Fundraising process. Check out the tools and examples we shared, but also here are some other tools we would like to recommend you use to build your organization's profile and to ensure transparency of its activities and programs:

- Publish and make sure that your most important stakeholders, such as your sponsors, receive the organization's annual report;

- Keep your website and social media channels up-to-date with relevant information for your clients, donors, partners and other stakeholders;

- Develop a newsletter or send regular information about your organization to your clients, donors, partners and other stakeholders;

- Develop communication tools that your stakeholders could use to contact you and ask any question about your organization, your programs, your results, etc. (such as contact forms, donor's or client's special email contact, special phone lines, Q&A section on your website, etc.) and answer any request for information promptly, you might receive from your clients, donors, partners and any member of the community;

- Organize open doors days and other similar events for your clients, donors, potential donors, partners and potential partners;

- Participate in NGOs fairs or other public events dedicated to non-profit organizations or specific programs or services to be presented to the general public, to the community or specific target groups, such as business associations, companies, etc.

- Develop, publish and respect your stewardship policies, showing how you do things in your organization when you receive money or other support, how you treat this support, how you use it, how you inform your supporters/donors, etc.

- Publish the names of the people from your board of directors and of your team members, and other relevant information about them, on your website and in other online or printed materials that definitely need to include this information, so as to demonstrate your good Governance practices;

- Organize individual meetings, more or less formal, with your main stakeholders, such as business donors, to "catch up" and present your results and to discuss with them the impact of their support.

References:

Dan Linn, Solution Link IMS, The Importance of Your Non-profit Organization's Branding, available at:

<https://www.solutionlinkims.com/blog/the-importance-of-your-non-profit-organizations-branding;>

Matthew Schwartz, The 6 Keys to Effective Non-profit Branding, 2018, available at:

[https://constructive.co/insight/the-6-keys-to-effective-non-profit-branding/;](https://constructive.co/insight/the-6-keys-to-effective-non-profit-branding/)

Elisabeth McCumber, The importance of branding for non-profits: how to get internal buy-in and build a stronger brand, 2018, available at:

<https://medium.com/madison-ave-collective/the-importance-of-branding-for-non-profits-how-to-get-internal-buy-in-and-build-a-stronger-brand-47ed7c760f5c;>

Sarah Waldman, Why Branding for Non-profits Matters Now More Than Ever, 2018, available at:

[https://www.bigdropinc.com/blog/why-branding-for-non-profits-matters-now-more-than-ever/;](https://www.bigdropinc.com/blog/why-branding-for-non-profits-matters-now-more-than-ever/)

Forbes Non-profit Council, Nine Aspects To Consider When Branding A Non-profit, 2018, available at:

<https://www.forbes.com/sites/forbesnon-profitcouncil/2018/08/30/nine-aspects-to-consider-when-branding-a-non-profit.>

Workshop Scenario:

Building organizational reputation through powerful stories

Recommended size of the group: 15-25 people

Time: 90 minutes

Materials needed: video-projector, flip-chart paper, markers, colored paper (A5/A4 sheets)

Workshop's objectives:

- To learn how organizational reputation can be built using powerful stories;
- To be able to choose and collect critical stories about the organization, in order to build organizational reputation.



Preparation:

- Listen to the interview with David Hutchens about The Four Critical Stories Leaders Need For Influence:
<https://coachingforleaders.com/podcast/four-stories-leaders-influence/> or read Chapter 1 from Hutchens' book: Circle of the 9 Muses: A Storytelling Field Guide for Innovators (2015).
- Prepare some examples for the four core stories (identity, values, vision, and change & learning stories) or use the following presentation prepared by CoOp Partners to exemplify the four core categories: <https://spark.adobe.com/page/NOYGANBXnhe2e/>



Presentation:

1. Introduce the participants to the flash-story or 6 word-story. You could use the urban legend about how Hemingway bet with his friend that he would write the shortest novel in the world and he wrote this 6-word novel: "For sale: baby shoes, never worn."
2. Ask the participants to write a 6-word story about their organization or about a project/cause they are involved in. Ask them to write the flash-story on a colored sheet of paper (A5 or A4 sheet). Give the participants 5-10 minutes to write their stories.
3. Each participant reads out loud his/her story and then you place the colored paper, with the story, on the floor or on a wall, so that all participants can see all the stories at the end. While collecting the stories, try to put them in categories: stories about the vision of the organization, stories about the clients, stories about the values, stories about the history of the organization, stories about the change & learning processes in the organization, stories about the services the organization provides, etc. Create the categories based on what the participants provide, but also have in mind the theory you will present about David Hutchens' four core organizational stories (identity, values, vision stories and stories around change & learning).
4. After all the participants introduced their stories, present to the participants the categories you identified, and ask them to help you to reorganize the categories, if needed. Ask in forum what other stories can be told about one organization, and based on the responses given and the stories collected start to introduce participants to David Hutchens' theory on the four critical stories leaders should use to build the organizational reputation.
5. You can use the following presentation prepared by CoOp partners to exemplify the four categories (identity, values, vision stories and stories for change & learning), or you could use your own examples: <https://spark.adobe.com/page/NOYGANBXnhe2e/>.
6. Afterwards, ask the participants to identify in their organization, a story for each of the category you presented to them, and write the main idea of the stories on colored papers. Give them 10-15 minutes to choose the stories and write the main ideas of the four stories.
7. Ask some of the participants to share their stories (the main idea of each story). You could allow for two or three stories per category to be presented.

4.2 Learn how to pitch your organization and your projects to SMEs

For many of us in non-profit sector, talking about the great things we do and plan to do is one of our favorite things, and our passion comes through. So, compressing these important things into a few key points is not the easiest thing to do when you are introducing your organization or project ideas to somebody for the first time.

Considering the decreasing attention span of people in general, and the competitive nature of getting people's attention around supporting your cause, to inform them or engage them to become Partners, we are obliged to compromise, cut long speeches and find short effective ways to communicate and start conversations. Communication experts have been working on this and developing new methods for some time now. The Elevator Pitch, a relatively recent buzz word/concept, is one of those methods. In a non-profit context, it can be described as a brief explanation that describes your organization, what it does, and why it's important. It's a great way to start a discussion with anybody about your non-profit and it allows your audience to understand your work in a few interesting, memorable and clear short sentences.

If you go online and search "elevator pitch structure", you will find almost six million results for that search! Here is one simple structure you could use to develop your pitch – be it longer or shorter. You could start with one sentence and develop it into one paragraph or one page for different circumstances, but keep in mind these parts that you cannot miss in your pitch, describing why people or your community need your organization or your project.

Elevator Pitch sentence structure:

FOR (target customer), WHO HAS (customer need), (product name) IS A (market category) THAT (one key benefit).
UNLIKE (competition), THE PRODUCT (unique differentiator).

(Source: Gray et al, 2018)

For example, this structure could work as follows for an internship program: “For university students who need professional experience before getting out of school, the ‘Internship With Us’ program is a professional development program that provides students with the real-work experience they need to enhance their employability. Unlike a regular internship program developed by just one company, ‘Internship With Us’ provides diverse internship positions in many companies and NGOs from our community, and allows students to apply for more than one position at a time”.

Most probably you will use the pitching technique in face-to-face interactions with SMEs’ owners or decision makers, no matter if you meet them in networking events or you really get a chance for a dedicated meeting with them. Also, you might use pitching in mail or email Fundraising campaigns addressing companies, or in online appeals or crowdfunding campaigns. The basic principles of the pitching stay the same, regardless of the Fundraising method you use.

You can find many tips and tricks by various experts about how to write or deliver successful pitches, yet Emmy Award winning correspondent and communications pro Bill McGowan's 7 principles of pitching is a good starting point as a guideline to a winning pitching. Conner summarized the principles very well in a Forbes article from 2014:

1. The Headline Principle. Get attention for a topic by sharing your best information first, McGowan says, especially if it’s a thought-provoking line that makes listeners think “I want to know more.” This is golden wisdom.

2. The Scorsese Principle. In a persuasive setting, you can hold attention by providing your audience with visual detail. For example, says McGowan, very few people who have seen Martin Scorsese’s movie Goodfellas can forget the scene with Paul Sorvino thinly slicing a garlic clove with a razor blade as he prepares a culinary feast while in jail. The image told a vivid story: Sorvino and his wise guy pals were living like kings behind bars. Consider this principle as you prepare your pitch or presentation. You are the director of your own organization or project story. What are the images (and also the details and words) that will bring your message to life?

3. The Pasta Sauce Principle. Every sauce is better when it’s boiled down to its essence. You should make your message as rich and brief as you possibly can, McGowan maintains. Your story takes three pages? What happens when you distill it to a couple of bullets and words? Avoid the temptation to overwhelm your audience. Leave them hungry for more.

4. The No-Tailgating Principle. Says McGowan, “The speed with which you talk should be directly proportional to your certainty of the next sentence coming out of your mouth.” The more certain you are, the more briskly you can speak. But if you’re prone to saying the first thing that pops into your head, slow your speaking – add strategic pauses – and be certain that every thought you utter has a strategic purpose and a distinct beginning, middle and end.

5. The Conviction Principle. Deals are won and engagement established with the strength of the speaker’s convictions. Be certain you are conveying certainty with your words, your posture, your expression and the tone of your voice.

6. The Curiosity Principle. The best broadcast interviewers earn trust, McGowan says, by displaying genuine interest in their interview subjects. Their demeanor expresses there’s nowhere else they’d rather be. For example, he notes, consider the former Meet the Press anchor Tim Russert. The look on his face conveyed how much he really did love his job. Consequently, he asked whatever he liked and his interview guests were remarkably forthcoming. No matter how direct the question, it was never perceived as a “gotcha” remark or low blow. This trait is useful in pitches and presentations as well.

7. The Draper Principle. Yes, this principle is named after the fictional Mad Men character Don Draper, who plays the role of creative director in a Manhattan advertising firm and is renowned for his ability to win pitches. The best way to stay on point in a persuasive discussion is to steer the dialogue into the directions that play to your strengths. It is the legendary Don Draper adage, “If you don’t like what’s being said, change the conversation.”

Whether you are following these principles or any other wise guidance in pitching, there is a crucial part of making pitches memorable and resonant. It is storytelling. Add the story of one of your clients or of one person from your target group, and your pitch will become even more powerful. Set the context (the beginning of the story) in which your client lives or struggles with a major challenge/a need/a problem. Be specific in describing the problem or challenge, add relevant details that “color” the story and engage the audience, and increase the tension (the middle of the story). Show how the challenge can be overcome and the problem solved through your product, program or organization, and how the end of the story depends on the donor’s support and involvement.

References:

Soren Petersen, Using Storytelling to Pitch Startups, available at:

https://www.huffingtonpost.com/soren-petersen/using-storytelling-to-pit_b_11080148.html?guccounter=1;

Cheryl Conner, Principles Of Persuasion: Bill McGowan's 7 Secrets For Saying The Right Words, Every Time, available at: <https://www.forbes.com/sites/cherylsnappconner/2014/02/22/principles-of-persuasion-bill-mcgowans-7-secrets-for-saying-the-right-words-every-time/#6433b8413689>;

Gloria Horsley, Eight Steps To Perfecting Your Non-profit's Pitch In Person, available at:

<https://www.forbes.com/sites/forbesnon-profitcouncil/2017/05/10/eight-steps-to-perfecting-your-non-profits-pitch-in-person/#1e703a5f69ea>;

Dave Gray, James Macanuso & Sunni Brown, Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers, O'Reilly, 2nd edition, 2018.

Workshop Scenario:

Learn how to pitch!

Recommended size of the group: 15-18 people

Time: 90 minutes

Materials needed: flip-chart paper, markers, sticky notes, pens

Workshop's objectives:

- To gain knowledge on how to develop and use an elevator pitch to present a program of the organization;
- To be able to use a simple elevator pitch structure for a program or the organization.

Preparation:

- Read the theory on pitching above, especially Bill McGowan's 7 principles of pitching;
- Read the original scenario that inspired this workshop and which was developed by Dave Gray (2010) and made available here: <http://gamestorming.com/elevator-pitch/>.

Presentation:

- 1.** Ask participants to write down, individually, on a sticky note the idea of a project from their organization that they would like to pitch to a business owner, who they would meet at a networking event;
- 2.** Then, once they selected the project, ask them to add on other sticky notes what will be the main things/aspects they would include in their pitch to the business owner. Each aspect should be written down on a separate sticky note.
- 3.** Split the participants in teams of three, and ask them to present in the small groups the projects they selected and what information they thought they would include in their pitch. Ask them to cluster the elements of the various pitch ideas, based on common elements they identified in their groups.
- 4.** When the teams finish their work, present the following elevator pitch structure developed by Gray et al. (2018):

Elevator Pitch sentence structure:

FOR (target customer), WHO HAS (customer need), (product name) IS A (market category) THAT (one key benefit) UNLIKE (competition), THE PRODUCT (unique differentiator).

5. Then, write on 7 flip-chart papers the main elements of the structure you have just introduced:

- Who is the target client?
- What is the client need?
- What is the project name?
- What is its market category?
- What is its key benefit?
- Who or what is the competition?
- What is the project's unique differentiator?

6. Ask each team to add to these flip-chart papers the elements they identified, which they wrote down on the sticky notes. Comment on the elements they identified, see what elements of the pitch were more obvious and which were less obvious, and follow-up with the participants asking them to reflect on why they might have missed some aspects and on how those are relevant for the business owner that will listen to them.

7. Ask each participant to develop a one sentence pitch for the project they initially selected, and also to imagine how they would approach the business owner in the networking event.

8. Then, split the group in two and "simulate" the networking event: half of the participants will be business owners, and the other half will be the "pitchers" (you could sign each group with sticky notes of two different colors they need to wear on their shirts during the "networking event"). There will be two rounds, so that the two groups can switch their roles. In each round, the "pitchers" could approach 3-5 business owners. For each business owner, you will give them 3-5 minutes, and then you will stop the role-play and ask them to move to the next "business owner".

9. Debrief the two rounds asking the participants what they learned from each of the two roles they play, and how they plan to improve their pitches and their methods of approaching people in such events.

Workshop Scenario:

Use the 'golden circle' to present your organization

Recommended size of the group: 16-26 people

Time: 90 minutes

Materials needed: video-projector, flip-chart paper, markers

Workshop's objectives:

- To learn about what makes organizational stories powerful for a general audience;
- To be able to use the 'golden circle' of Simon Sinek - why/how/what - in developing the story of the organization.

Preparation:

- Watch Simon Sinek's speech about the golden circle (why/how/what):

https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action/up-next?language=en;

- Prepare some examples of using the golden circle to present an NGO or a specific project.

Presentation:

1. Make a short introduction talking about how important is to connect our personal story to the story of the organization, when we pitch to others; why we consider our organization to be so important for the community. Ask the participants to write about the moment when they made the decision to join the organization they are currently involved or when they decided to contribute to a specific cause in their community. They need to write down a 1-minute story. Give them 5-10 minutes to write the story.
2. Ask them to share in pairs, each participant has one minute to share his/her story with another participant. After they are done sharing in pairs, ask for 4-5 examples from the participants, to share what they learnt about the person they listened to - why did the person joined the organization or why the organization is relevant for him/her or for the community?
3. Introduce the participants to the golden circle of why/how/what (Simon Sinek), which helps them to talk powerfully about their organizations. You can show the video, or explain it yourself, depending on the time you have.
4. Ask the participants to go back to their stories, and rewrite them using the golden circle (why/how/what). Give them 5-10 minutes to write the new story.
5. Afterwards, you will ask the participants to sit on two rows of chairs, facing each other. Each pair has to share the new stories, after 4-5 minutes, you make a signal and you ask just one row to move with one chair, so the pairs change. Do this for several times, until each participant can listen to and share his / her story to at least another 5-7 participants. In the pairs, each participant tells the story in one minute, and then they give each other feedback.
6. At the end, ask participants to nominate the story that stayed in their minds from the 5-7 stories they listened to, and asked why they think the story was the more powerful. Then, also ask the participants to share the challenges they faced in re-writing the story and in presenting it several times, and what changes they made in the story and why they changed the story.

4.3. How to communicate goals, objectives, added value and results to your business donors

The CoOp research on Youth organizations and SMEs cooperation showed that SMEs owners have clear expectations as to how NGOs should present their requests to them, in terms of needs, objectives and estimated results of the cause or project they propose. Thus, in Greece, Ireland, Norway and Romania, SMEs recommended to Youth organizations to include in their solicitations clear needs, simple objectives, achievable and concrete results, and clear expectations from the companies. Other recommendations related to the solicitation and reporting process, which were made by the SMEs' representatives we interviewed, in more than one country, were that the Youth organizations should focus on proving the direct and immediate impact of their projects on their target groups; the Youth organizations should improve their dissemination network and the promotion tools they use; the Youth organizations should improve their business expertise or/and business language; and the Youth organizations should ensure transparency and accountability of their activities and projects.

Also, the 25 experts in Fundraising, CSR & Youth work, from Greece, Ireland, Norway, Poland and Romania, that were interviewed by CoOp partners in order to develop these Fundraising and CSR resources for Youth organizations and their staff, agreed that the organizations should make sure that their asks and any communication about the project include: the value the organization or the project could provide, the impact of the intended work, and highly personalized benefits for the SMEs that would choose to support them. Also, the experts recommended Youth organizations to improve their solicitations by:

- Explaining the benefits of the project for the business and/or the owner, as well as for the community, and any mutual gains;
- Expressing concrete needs, expectations, activities, requests & the engagement expected from the company;
- Using storytelling (personal stories of the staff/volunteers, but also personal stories of the beneficiaries/target groups);
- Building real conversations, not monologues, showing genuine interest towards the company and the person listening to the pitch.

Donors in general, and SMEs in particular want to know exactly where their money goes, towards what specific goals and objectives, and then they want to know what was accomplished, and they "are increasingly demanding metrics to prove it" (Heyman, 2016, p. 65). The companies want to learn about the NGO's Theory of Change, how and when the impact of your work will be visible, and the results you have obtained so far. Thus, you need to measure progress, and this measurement will help your organization to improve its work, but also it will help you to collect "valuable insights, data points, and stories you can share with the outside world, enlisting their [donors] support" (Heyman, 2016, p. 66).

We would recommend that you work with KPIs (key performance indicators), combined with powerful individual stories from your clients, and from your staff and volunteers. KPIs are also recommended by the newest literature on Fundraising, because these provide a roadmap for how the organization's work advances the organization's vision and mission (Heyman, 2016). From the moment you prepare the proposal to the SME, you should be able to identify a limited number of KPIs, which should be meaningful and insightful for your proposal, but also, interesting and valuable for the SME you are going to approach.

Together with the KPIs, you should include in your communication - or at least be ready to answer questions related to - how you will measure your KPIs, the process you will use for collecting the data, the way in which you will then report the data to your supporters, and how you evaluate the results obtained towards your initial objectives and goals, and very importantly: how you will prove the value you promised to the companies who are your donors. It is advisable that someone from your organization should be trained on how to measure and report results and impact, as more and more funders, public and private, ask for clear and meaningful measurement of how their money brings change in the community.

Then, make sure to develop monitoring tools to record your progress towards your KPIs, and reporting tools to present the outputs and outcomes of your efforts to your donors. The reporting tools could be more or less formal, depending on the profile of the SME you are working with and based on their expectations for reporting. These reports could be project- or event-based, or they could be monthly, quarterly or annual reports. There is no general rule as to what kind of reports SMEs expects, but be sure to personalize these reports according to the SMEs' needs and expectations: in any case it should include at least the following information:

- overview of the activities undertaken during the reporting period, and the activities planned for the next time frame agreed with the SME;
- progress report on the established KPIs and key results obtained (outputs and outcomes), with a special focus on the key benefits or added value the project provides to the SME/your donor;
- money spent and money left to be spent;
- key dates, meetings or events coming up in the project, especially any which could be interesting for the SME donor;
- promotion and dissemination activities and results - how the project's activities and results reach the bigger community, mainly the parts of the community the SME is interested in - its employees, its current or future clients, and its current or potential new business partners;
- problems or obstacles encountered in reaching the KPIs and the expected results. Keep in mind: "do not keep bad news to yourself; communicate with donors and supporters transparently to build an authentic relationship" (Heyman, 2016, p. 74).
- finally, stories of people you serve, but also of staff and volunteers, stories which could talk both about the project reality and the Theory of Change you use in the community, and about the impact of the project in the life of its main stakeholders.

Stories are important because "people don't give to organizations; they give to people" (Heyman, 2016, p. 67), and you need to dedicate time and staff specifically to collecting stories. The stories you use should talk about success, but also they should demonstrate the social issues that you plan to address with your organization's services.

Finally, when you present your ideas to the SMEs/potential donors, when you present your goals, objectives, activities, your Theory of Change and the estimated results, impact, benefits, etc., you should attract their attention and make sure these ideas stick in their minds and move them to action. For this, we recommend to use the “six principles of sticky ideas” developed by Heath & Heath (2007):

1. Simplicity. Get down to the core idea of what you want to say, think in terms of proverbs, prioritize information, make the idea simple and profound, meaningful for your audience, in our case, the SME owner or decision maker.

2. Unexpectedness. Your idea needs to be counterintuitive, you can use surprise to grab people’s attention, but then you also need to generate curiosity and interest. And for that, the way in which you present the ideas should open a knowledge gap in the mind of the audience, and then let the story fill in those gaps.

3. Concreteness. “Mission statements, synergies, strategies, visions—they are often ambiguous to the point of being meaningless.” Explain your ideas, using terms of human actions and of sensory information, because our brain is wired to remember concrete information.

4. Credibility. Experts’ authority or figures and data might help to gain credibility in the eyes of the SMEs owner or decision makers, but what makes ideas even more powerful is when we help people test new ideas themselves. People believe what they have lived or might live through, what they see with their own eyes, what they experience, etc. So, connect your ideas to what people know already or could somehow test.

5. Emotions. Your ideas should make the audience feel something: people care for people, not for abstract concepts and information. The tricky part here is to find the right emotion to “exploit” and move the audience from there into action.

6. Stories. The stories bring emotions in, as well, but most importantly they help people to mentally rehearse and understand a particular situation, and that in turn supports them to react according to the story you tell.

Resources:

Chip Heath & Dan Heath, *Made to Stick: Why Some Ideas Survive and Others Die*, Penguin Random House LLC, 2007;

Darian Rodriguez Heyman, *Non-profit Fundraising 101*, John Wiley & Sons, Inc., 2016.

Workshop Scenario:

Stick your objectives, KPIs and results here!

Recommended size of the group: 15-20 people

Time: 60 minutes

Materials needed: video-projector, flip-chart paper, markers

Workshop's objectives:

- To learn about the importance of expressing needs, objectives and estimated results clearly to the business partners;
- To be able to present a project idea using the business language (KPIs, outputs, outcomes and impact) and the six principles of "sticky" ideas.

Preparation:

- Read the theory about how to communicate objectives, KPIs, outputs, outcomes and impact to companies, and about the six principles of "sticky" stories (Heath & Heath, 2007);
- Find an interesting international summer camp for kids, in Europe. A source of inspiration could be this article:
<https://world-schools.com/best-summer-camps-in-europe/>;
- Read the case study of the cooperation between Fundatia Danis and Young (Romania) on the CoOp project website.



Presentation:

- 1.** You ask the participants to go back in time, and for the purpose of the next exercise, for a moment, to be the kid they were at 10 years old. They want to go to an international summer camp for the first time, like the one that you selected and presented to them (show them the main activities and objectives of the camp you selected). With the mind of a 10 year old kid, they should prepare a short speech to convince their parents to financially support their participation in the camp. Give them 5-10 minutes to prepare their speech, remind them to use the language, the mindset and the enthusiasm of a 10 year old kid.
- 2.** When they are finished, ask some of them to read or present their speech to the parents. You can have 8-10 participants sharing, but none of the speech should be longer than one minute.
- 3.** After the sharing (hoping that there will be some laughs as well, as the participants should act like kids again), ask them to be the parents now and think of what information they missed from their kids. Write down, on a flip chart paper, the things they mention as being missed.
- 4.** Then, tell them that this exercise was a metaphor for how NGOs present sometimes their projects to the companies, missing maybe sometimes the language of the businesses or their expectations, like parents missed certain concrete information from their kids about the camp: what needs the camp fulfill (is it right for their kid?), the goal of the camp, objectives and estimated results, with key performance indicators (to make sure their kids really get what is promised), and impact (how will the camp help their kids in the future?), etc.
- 5.** Use this moment to introduce them to the theory on how to present objectives, KPIs, outputs and outcomes; also, share with them the six principles of “sticky” stories.
- 6.** Ask them to go back to their short speeches and add one or two objectives and KPIs, outputs and outcomes; also ask them to try to include in their speech at least two principles from the ones you presented on “sticky” stories.
- 7.** At the end, ask some participants to share what they changed in their presentation for the parents.
- 8.** Wrap-up the session with reflections on what was learned, following the last presentations of the participants, observing what they changed in the presentations. You could end up also with a case study of cooperation between Fundatia Danis and Young (Romania), in which the organization, with the help of the SME owner, identified the company’s objective and interest in the project they supported, and added an extra activity and new objectives to the initial proposal.

Workshop Scenario:

What is your Theory of Change?

Recommended size of the group: 12-15 people

Time: 90 minutes

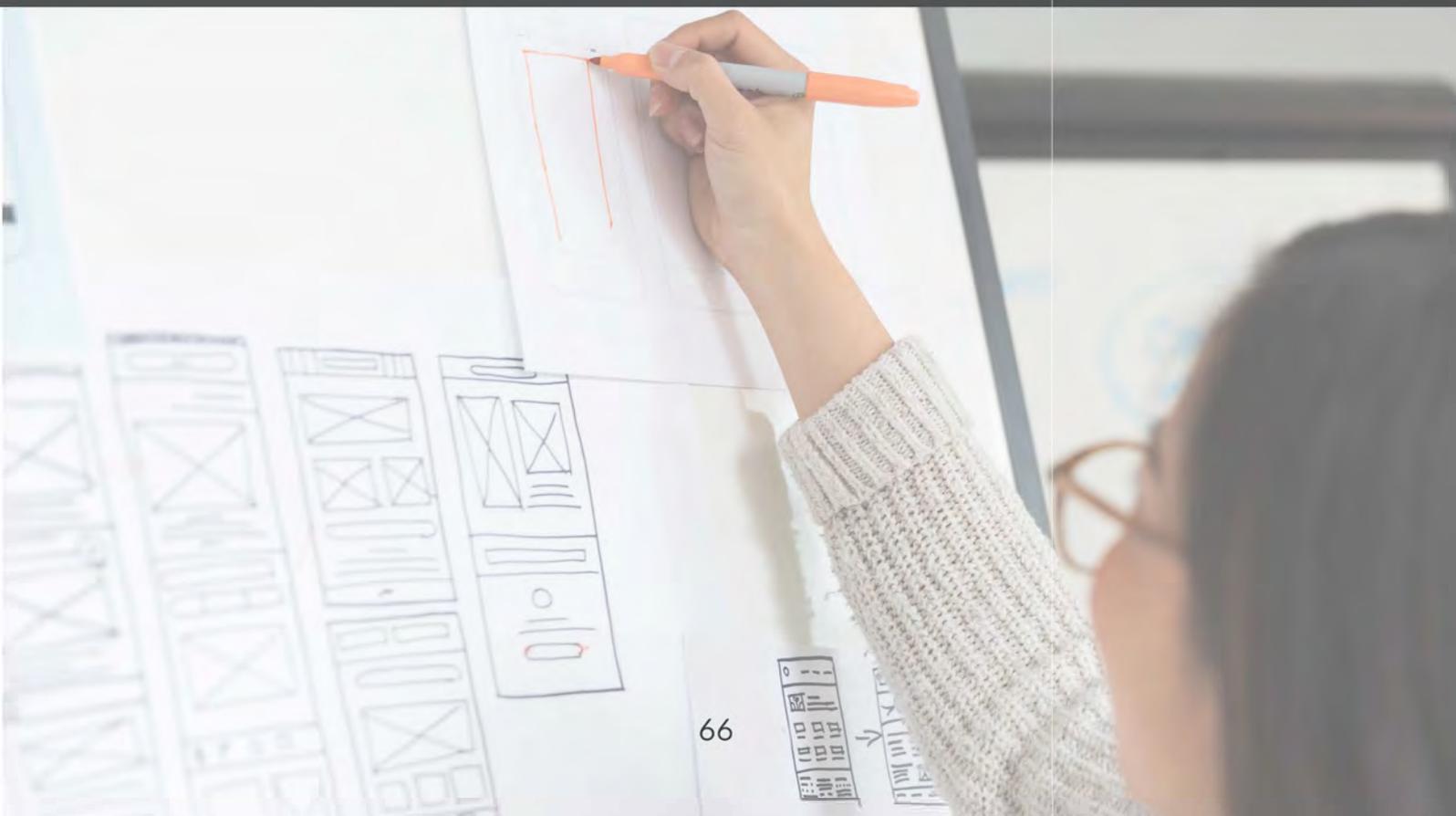
Materials needed: video-projector, flip-chart paper, markers

Workshop's objectives:

- To learn about the importance of including the business supporters in the logic of a project, of treating them as a valuable stakeholder;
- To be able to use The Theory of Change tool for clarifying priorities, goals and the path to follow towards social impact.

Preparation:

- Read the theory about how to communicate objectives, KPIs, outputs, outcomes and impact to companies, and the Theory of Change tool from this link: <https://diyToolkit.org/tools/theory-of-change/>. Prepare to present the tool using the example of a community problem and project that addresses that problem, with which you are already familiar.
- Identify 3-5 relevant problems for young people from your community, and write them down on separate pieces of paper. These could be problems like: the young people from our community need to find jobs at the end of their studies; the young people from our community need to become more autonomous for adult life; the young people from our community need to develop the skills of the future to be better prepared for the labor and entrepreneurship market; the young people from our community need better access to the housing, etc.



Presentation:

1. Ask the participants in forum how they usually design their projects, where do they start, what is the creative process in their organizations for developing new proposals, especially when they want to approach local businesses to get their support for these projects. Write their ideas down on flip-chart paper, try to observe the pattern. Explain that through this exercise they will learn a new tool for planning projects such that they prioritize their actions, and generate real impact and solutions to the community issues.

2. Split the participants in teams (4-5 members in each team), and give each team one of the problems you prepared on separate pieces of paper. Ask each team to come up with a solution to the problem they received, planned out on a flipchart paper. They should also think about how they could involve a local company into the solution/project (they should identify the profile of a company that they will consider fit for their project and also present how they expect the company to be involved in the project). They can work for 20 minutes on their ideas.

3. Each team presents their solution, which company they chose, and how the company is expected to support the project (you can allocate 5-7 minutes for each presentation). After each presentation, collect feedback from the other participants, ask them what they feel was missing from the presentations and how they might involve the companies differently or more deeply into the project.

4. Introduce the participants to the Theory of Change tool, by using an example of a project you are familiar with.

5. After the presentation, ask the participants to go back in their teams and “redesign” their solutions/project ideas using the new tool, and making sure that they include the company in the project as a real stakeholder for the solution, not only as a sponsor.

6. When they are done, ask each team to reflect in forum on the biggest challenges they encountered in using the new tool, and the new things they were able to add to their solutions and the new role they found for the company. Wrap-up the session with summarizing the main advantages of using the Theory of Change tool and generating more impact by involving companies in a smarter, deeper way.



4.4 Building meaningful relationships with your potential or current business supporters

The CoOp research on Youth organizations and SMEs cooperation showed that SMEs owners are really interested in developing a long-lasting relationship with the NGOs they support. One of the most important and common topics that emerged of the interviews and focus groups conducted in the five countries with SMEs owners and representatives was the issue of trust. In four countries (Ireland, Norway, Poland and Romania), the SMEs owners or representatives insisted that the Youth organizations should make sure they spend the time to develop a trusting relationship with businesses, and to present only trustworthy causes and projects.

Indeed, the theory and practice of Fundraising tell us that Fundraising is not about money, but about relationships. Always. Relationship Fundraising is a Fundraising approach whereby people are at the core and matter most (Burnett, 2002): "Relationship Fundraising advocates a return to the intimacy of the one-to-one relationship between donor and cause but, thanks to the miracle of modern technology, it makes that intimacy possible on a national scale for thousands, even millions, of people at the same time. (...) centers on the unique and special relationship between a non-profit and each supporter. Its overriding consideration is to care for and develop that bond and to do nothing that might damage or jeopardize it. Every activity is therefore geared towards making sure donors know that they are important, valued, and considered, which has the effect of maximizing funds per donor in the long term" (Burnett, 2002, pp. 37-38).

There are nine 'keys' to building relationships in order to achieve donor loyalty and get supporters more involved in the organization. There are adapted from Burnett (2002, pp. 45-46), based on the Relationship Fundraising philosophy:

1. **Be honest** with your donors, supporters, constituencies, etc. - with everyone.
2. **Be sincere and let your commitment show:** people and companies give because they care enough to take action and support your organization, so let them see you care too, and that you are there for the same reasons.
3. **Be prompt.** Reply quickly and efficiently to any concern, question, request; prompt response shows the donor you care about them and about their problems, questions, concerns, etc.
4. **Be regular.** Be consistent, have regular communication with donors, keep them informed. Keep in mind that when you are not consistent and regular in communication, other NGOs are, and they might reach your donors while you are silent.
5. **Be interesting and memorable.** Fundraising is also about storytelling and compelling cases told to donors; tell memorable stories (content, style and presentation) and use unforgettable visuals.
6. **Be engaging.** Do not let your donors to be passive, involve them, ask for opinions, suggestions, complaints, feedback, and expertise; invite them to task forces, focus groups, meetings, project visits, etc. but use their time wisely and meaningfully!
7. **Be cheerful and helpful.** Never let the donors feel that asking for something is generating trouble, promote your help; you should always be there to help them.
8. **Be reliable.** Always keep your promises, show donors that your organization and you are trustworthy; stand by your mission and do not compromise.
9. **Be cost-effective.** Be transparent on how you use the money, explain financial decisions, and show donors that their money is in good hands.

Practice these nine keys of building relationship as your mantra. They are the basis of any communication and relationship with your donors, sponsors, supporters, no matter how you call them. Then, use these keys in all your cultivation activities, also named “donor care activities” or “donor stewardship”. The main objectives of the cultivation activities are: nurture your donors’ loyalty towards your organization and increase the donors’ involvement in the organization.

These kinds of activities could include, but are not limited to (the only limit is your creativity, so be creative!):

- prompt acknowledgement of their support/contributions, etc.;
- newsletters;
- mailings or emails about the organization and its programs (personalize them);
- invitations to visit the organization’s work and connect with your clients;
- personalized greetings on birthdays, holidays, special events in the company’s life;
- social gatherings (lunches, breakfasts, dinners, picnics, etc.);
- networking events with other company-donors or with other constituents/stakeholders who are interesting to them;
- invitations to be part of a task force, committee or even your board;
- invitations to give speeches for volunteers or clients or to provide expertise in specific programs;
- invitations to be part of focus groups on various themes;
- invitations to the annual meetings or other meetings of the organizations;
- publish their names and pictures in the organization’s recognition materials (annual reports, websites, newsletters, etc.);
- open door events and special events for your donors;
- small gifts (merchandise products or products made by your clients) that will serve as reminders of their involvement in your cause, etc.

Pay attention not to use expensive methods of cultivation... if you invite the CEO of a SME for dinner in a very expensive place, or if you organize expensive networking events for your business donors, in both cases you might send the message that you do not need money and/or that you spend the money for luxury meetings, and not for the programs. This is not the impression you should give!

Cultivation methods can be used for nurturing relationships with prospects or with current donors. Cultivation, thus the building relationship process, should never stop, unless the donor asks you to stop. During the cultivation process, always be honest, straightforward, realistic, and use people’s time wisely.

An organization that wants to work systematically with its donors and supporters should develop a cultivation plan; it should focus on aspects such as: donor segments (split in groups based on gifts size, Fundraising methods, donors’ interests, donors’ demographic data, etc.), communication content with the donors (content based on stories about the people you serve, about results or news from the organization), channel of communication to be used in the process (email, newsletter, phone, letters, social media - assigned to specific donor segments), communication frequency (how often you plan to reach your donors), methods of cultivation or types of activities you plan for each donor segments (like the one described above) (ARC, 2013, pp. 103-104).

Resources:

Ken Burnett, *Relationship Fundraising: A Donor Based Approach to the Business of Raising Money*, Jossey-Bass, 2002.

Asociatia pentru Relatii Comunitare, *Ingrediente si retete pentru atragerea de fonduri*, ARC, 2013.

Workshop Scenario:

Show your business supporters that you care about them

Recommended size of the group: 12-15 people

Time: 90 minutes

Materials needed: video-projector, flip-chart paper, markers

Workshop's objectives:

- To learn about the relationship building process;
- To be able to identify appropriate methods of relationship building (cultivation) for the organization's donors.

Preparation:

- Read the theory about relationship building;
- Read the case study about the cooperation between RATIO Association and Absolvire de la A la Z (Romania) from the CoOp project website.

Presentation:

1. Quickly introduce the group to the case study about the cooperation between RATIO Association and Absolvire de la A la Z (Romania). Show them the case study from the CoOp project website. Then ask the participants to identify themselves, for this exercise, with the Student Association. They have just delivered the last RATIO Academy, for 120 students, in which they involved approximately 10 SMEs, like Absolvire de la A la Z, and you could read to the group what the Vice President of the Association believes about the value of these companies' involvement:

"I was reflecting recently on the success of our Academy... It is wonderful to have big companies, big names in the Academy, which provide workshops, Training courses, and open their doors to show students how it's to work in their companies. This is wonderful, but without the help of the SMEs, such an event cannot really take place. The Academy can be perfect only with making the small details of the event perfect - like the food we give to the participants, the accommodation, the fun events we organize for them, the merchandise items we print for them, the memories of the event - photos, videos, etc. In other words, these small companies make our event great, in the end" (Raluca Bogdan, vice president of RATIO Association).

2. Tell the group that now is the time to say thank you, recognize these companies' involvement, provide them with feedback and also find a way to build further cooperation, because the Student Association wishes to maintain their partnership long term. Thus the RATIO Association wants to organize a relationship building event.

3. Split the group in teams (4-5 members each), and ask each team to:

- a. Come up with a creative and professional communication method/channel of saying thank you and provide feedback to these small companies, right after the end of Academia RATIO;
- b. Make a plan for a relationship building event (type of event, main moments of the events, methods/moments of recognition during the event, strategies to ensure the partnership for upcoming projects).

Give them 20-25 minutes to work on the tasks. Each group has then 5-7 minutes to present their ideas.

4. After all the presentations are done, ask the participants to identify themselves as those SMEs that supported the RATIO Academy, and reflect on the events and the communication methods that were prepared for them. You should also provide general feedback on the events and the proposed communication methods, talking about: objectives of the communications and of the events, the proposed recognition activities, the proposed ways to get more/future involvement from the SMEs, and how all if this could fit the interests of the companies and build trust between the organization and the business supporters.

5. Then, introduce the theory on relationship building, focusing on the following aspects:

- a. The main objectives of any cultivation/relationship building process;
- b. The 9 principles of relationship building.

6. Ask the participants to go back to their teams for another five minutes, and add to their events, any components they might have missed. It is expected that they might miss activities/opportunities in the event through which the sponsors could interact with the beneficiaries of the RATIO Academy or with other projects of RATIO Association.

7. Each team will present in one minute the new additions to their events or what they changed.

8. Ask them to reflect on what they learned through the exercise, and wrap-up the exercise by adding your own reflections with a focus on how cultivation methods and communication methods and channels should be personalized as much as possible, in order to develop that “intimacy of the one-to-one relationship” with the donor, that Burnett (2002) talks about.



Services and expertise/pro-bono work often overlap so they are in one category in the chart below.

Some examples of in-kind donations include:

Goods	Services / pro-bono expertise	Free Space
<ul style="list-style-type: none"> ● IT equipment incl. computers, phones, photocopiers, scanners, other devices ● Books ● Office equipment ● Supplies like paper and folders ● Sports/outdoor activities Equipment ● Furniture ● Musical Instruments ● Cooking Equipment ● Materials for workshops, ● Food/refreshments ● Games or toys ● Clothes ● Car or van ● Clothing ● Raffle prizes ● Toiletries ● Vouchers ● Items for auction 	<ul style="list-style-type: none"> ● Bookkeeping ● Web design ● Web hosting ● Copying/printing ● Place on Training courses ● Professional services (accounting, lawyer, auditor etc.) ● Mentoring/tutoring ● Editing/graphic design/publishing support ● Advertising & marketing ● Video-making & photography ● Event planning ● Strategy (mentoring or facilitation in Strategic planning, change management etc.) ● Transport ● Repairs and maintenance for vehicles or buildings ● Board membership ● Childcare ● Fundraising ● Research ● Mentoring ● Counselling hours ● Physical Therapy hours ● Audio/video technician for events ● Mailing fulfilment 	<ul style="list-style-type: none"> ● Training venue ● Office or co-working space ● Storage ● Advertising space ● Meeting, conference or events venue ● Kitchen ● Residential venue for trips away ● Use of a library ● use of an entertainment venue ● Parking

Why should you look for in-kind support?

- **To increase your overall resources:** cash is, obviously, an ideal resource seen as it builds capacity... particularly if it allows you to pay for more staff etc., but many SMEs won't or can't donate cash or feel uncomfortable about doing so, but they'd be happy, if asked, to give supplies, space, or time. Since Youth NGOs, particularly local community-based ones, often need these kinds of resources, this can be a great match.
- **To find other sources of support:** an in-kind ask is much easier to start with than a cash ask. This can help you to build a relationship with a local business that will grow into something much bigger later. Anyone who gave you anything has more of a stake in seeing you succeed. You are getting good will and interest in the bargain, and developing your network.
- **To obtain items, equipment, etc.** that you might otherwise have no access to. There are items or services that your core funders may not like to spend on or permit you to buy with their restricted funding (new furniture or better IT tools can be examples where they prefer you to keep using older equipment to save cash but your work would be improved by newer equipment. And what a commercial business is discarding because they are upgrading is often an improvement on what an NGO currently has (again, think computer, copiers, printer, office furniture, kitchen equipment...))
- **To increase your 'matching potential':** a lot of funders and grant-giving committees require you to match their donation towards a project, but allow in-kind items to be counted within that alongside cash. Typically your staff time and often also the volunteers' time can be counted, and in-kind items such as if you have the use of a venue for free, you can estimate what the rent would cost and this can count towards your matching total.

How to get in-kind support?

NGOs should be careful to properly communicate their needs, target the most likely donors, and document all items properly to ensure they receive the items they need the most.

- Start with your Needs Assessment and extract the in-kind items
- Look at your stakeholder mapping to identify possible obvious in-kind providers
- Research other possible donors beyond your immediate stakeholders
- Think about the best timing for your ask, and be ready to grab opportunities

What motivations SMEs to give in-kind donations ?

Many donors are drawn to giving in-kind donations rather than money, at least the first time they get involved with an NGO. Some are keen that their donations reach beneficiaries in their own community versus sending money to a national level organization. Some SMEs are interested in providing in-kind donations for the positive public relations and image.

Many are interested in giving their time doing things such as mentoring, bookkeeping... they enjoy interacting with the NGO, their staff, volunteers and beneficiaries, while also adding value through their unique expertise.

Whatever the reason, knowing your 'target' SMEs will help you determine how to ask for donations and how to specify what you need and do not need.

Sometimes donated goods are either second hand or otherwise surplus. If not donated to people, they might otherwise end up in a landfill. Such in-kind gifts reduce resource wastage and pollution. This provides an option for companies to 'tick an additional box' with their CSR programme by doing good on the environmental and sustainability side, as well as helping the NGO itself. It might even save them money on waste disposal costs or storage costs in some cases. When relevant, bare these additional motivations in mind when preparing a pitch or a request letter, and when thanking and reporting back on the use of the donation.

Take advantage of situations that you notice around you, or time-specific opportunities that are coming up. There could be a business doing renovations near you, that may be willing to donate furniture and other goods that it would otherwise throw away. A new business might want to generate good will in the community by providing some in-kind goods or services to get their name out there. A business may have a very seasonal production cycle and get rid of surplus stock at particular times of the year, and so on...

Additional Considerations

- You don't need to accept every in-kind donation that is offered to you, as you might create a negative relationship if you accept a product or service that you cannot/will not use. If it is a donation that you can't use or do not have the capacity to manage, gracefully decline the offer (if you know one, you might suggest a more appropriate NGO that might be interested). Having your Needs Assessment done allows you and the donor to see what is really useful and reduces your chances of receiving a donation that you will not use.
- Some donations have hidden costs and pose issues such as requiring time, money, and personnel to process or to maintain usage in the future.

References:

<http://www.strengtheningnon-profits.org>

<https://ctb.ku.edu/en>



Workshop Scenario:

Preparing to ask for in-kind support

Recommended size of the group: 12-15 people

Time: 60 minutes

Materials needed: flip-chart paper, markers, post-it notes

Workshop's objectives:

To learn how to fulfil your NGO's resourcing needs with in-kind support in practice

Preparation:

Print the relevant theory for the teams to read, unless it has been presented to the group just before.

Read the theory and the examples about in-kind support (this chapter above) - 10 min

Refresh on the needs assessment (in chapter 2 'NGO needs for CSR with SMEs') - 5 min to refresh their memory

Presentation:

1. Split your group in teams of 3-5 participants (try to have 4-5 teams, but not more than that), and make sure they have their needs assessment in front of them. Give them 5 minutes to list the needs again on a sheet of flip chart paper

2. Now ask the teams to make a list of the SMEs they have links to, which might be able to help them. Who do they know, who might be able to provide support? To make this exercise efficient, suggest they follow a structured approach by stakeholder groups:

- Does anyone on the Board of the NGO own, or work in, an SME? What about their partners or family members?
- Go through the NGO staff in the same way - does anyone have close connections to any of the local businesses?
- Consider the volunteers and look for connections there
- Note also any existing or past supporters: it is often easiest to approach existing supporters
- Finally they should list any businesses that have provided similar support to similar causes before, as this indicates they are open to this.

They should note each potential SME contact on one post-it note. 10 min

3. It is time now to associate some of the in-kind needs to some of these contacts, placing the post-it notes against the needs on the flip chart paper. If the teams struggle to find suitable 'targets' in their lists, they should research further afield and find local firms that provide the goods or services they need (perhaps using the Profiling skills learnt elsewhere in this Toolkit also). (10 min)
4. The teams should now start to think about what could encourage the SMEs they plan to target, to grant their request? What could motivate them? On the flipside, what could be a barrier to them agreeing? In particular, for this exercise, it is good to get into the mindset of being more business-like: think of helping the SME to solve a problem or achieve one of their own objectives. Listing motivations and barriers on the post-it notes takes 10 min.
5. They need to think also about the right time to ask. Are there obvious times that make sense, considering factors like seasonality, end of financial year, stock takes 5 min.
6. Finally the teams should take another 10 minutes to plan how they will approach the SMEs: who will contact them? how? when? how will they ask? who will they address? will they ask for the goods or services immediately, or attempt an introduction first to present the NGO to the SME?



Workshop Scenario:

When CSR support 'goes bad'

Recommended size of the group: 12-15 people

Time: 60 minutes

Materials needed: flip-chart paper, markers

Workshop's objectives:

Learn how to avoid bad experiences with in-kind support

Preparation:

Read the following to the participants to introduce the concept of 'bad' in-kind donations and check the group understand (5min):

You don't need to accept every in-kind donation that is offered, as you might create a negative relationship if you accept a product or service that you cannot use. Some donations have hidden costs and pose issues such as requiring time, money, and personnel to process or to maintain the usage of in the future. If it is a donation that you can't use or do not have the capacity to manage, gracefully decline the offer (and if you know one, you might suggest a more appropriate NGO that might be interested).

Presentation:

1. Split your group into an even number of teams. Half of the teams will role play as the SMEs making an offer of in-kind help to a Youth NGO, and the other teams will role-play as NGOs receiving this offer: they must accept, refuse or negotiate. Then, the roles will be reversed for the second round. Take 5 min to get organized into groups
2. Spend 10 minutes pretending you are the SME, and decide what you will offer the local Youth Organization. It should be something that is convenient for you to offer or something that you think is a nice 'feel good' idea for yourselves. Don't consider whether it is helpful to the NGO (pretend you do not know much about how the NGO operates, or what it needs).

Examples:

If the participants are struggling to come up with an idea you can give them examples:

- the SME makes smoothies and has leftover stock to donate every Saturday evening (the Youth center is closed from Saturday afternoon until Monday morning)
- the SME makes bicycle tires and wants to donate free tires once a year to the value of 500 euro
- the SME develops mobile apps for mobile and wants to help but cannot afford to give cash so they offer a day painting the Youth club walls (but the Youth club was already freshly painted this year)
- a local pub offer free crates of beer
- a local lawyer offers pro-bono services (but the NGO does not need any legal advice at this time)
- create your own ideas of 'unsuitable' or 'difficult to manage' or 'badly timed' offers of in-kind help from SMEs...

3. Then, choose who will act as SMEs first and make your offers to the NGOs.
4. The NGO teams must go away and deliberate for about 5 minutes as to how they feel about the offer, does it cause any issues (practical, ethical, etc.)? Whether to accept or not, whether to try and negotiate for a different arrangement etc.
5. Set them up to role-play going back to the SME and communicating their decision or negotiating (5 min per pair of teams)
6. Do a feedback round to discuss what the NGOs could have done better in how they handled the relationship/negotiations. (5 min)
7. Repeat the process the other way! (5 min role play per team + a 5 min feedback round)

5.1.2 Financial Support

Financial donations and contributions have been and remain the most common request in Fundraising. The theory indicates that financial support can take various forms; more specifically it can include, but is not limited to: Cash donations, Sponsorship, Matching gift programs, Payroll giving, and Income-Generating Activities.

Basic steps in getting financial support from a company

1. Understand what you have to offer a sponsor
2. Identify possible, relevant sponsors
3. Create the proposal package
4. Make the approach
5. Deliver the sponsorship proposal and follow-up
6. Agreement/Sign-off of the contract

The 7 key sections of your proposal

- I. Opportunity: an executive summary or synopsis, focusing on the description of the activity and the benefits for the sponsor. Include: who you are, what you do (in general), what you will do (specific programme) and what's in it for them.
- II. Measures of Success: Document the quantitative and qualitative metrics you will use to measure the success of the programme.
- III. Value to the Sponsor: this is the sell, the "what's in it for me".
- IV. Terms and Conditions: the cost, time and any other relevant info of the activities. This is the part that includes the financial 'request'.
- V. Call to Action: Include: 1. All of your contact details including email, mobile phone, social media and website address, 2. An opportunity to come and see you in action if appropriate e.g. an regular event, 3. A message thanking the sponsors for their time and for considering your proposal

Additional Considerations

Flexibility depending on your needs, target and audience: adjust your proposal as needed.

Resources:

Beudean P., Sevincer, V. (2018). Comparative Report on SMEs and Youth organizations cooperation, available at:

https://coop.norsensus.no/resource/uploads/2018/08/CoOp-Comparative-Report_ok.pdf.

Skildum-Reid, K., Grey, A.M. (2014). The Sponsorship Seeker's Toolkit, Fourth Edition, New York: McGraw-Hill Education.

<https://www.amazon.com/Sponsorship-Seekers-Toolkit-Fourth/dp/0071825797>.

Weinstein, S. (2009). The Complete Guide to Fundraising Management, 3rd edition, John Wiley & Sons, Inc.

<https://www.amazon.com/Complete-Guide-Fundraising-Management/dp/047037506X>.

Oberauer, K. 10 essential steps to create a winning sponsorship proposal, available at

<https://practicalsponsorshipideas.com/create-a-winning-sponsorship-proposal/>



Workshop Scenario:

Developing a project idea with the use of Fundraising Tools - The Business Model Canvas

Recommended size of the group: 20-25 people

Time: 90 minutes

Materials needed:

flip-chart or A3 paper with Business Model Canvas (1 per group); marker or pen (1 per group)

Workshop's objectives:

By completing this scenario Youth workers will:

- Acquire basic knowledge on Fundraising tools related to financial support and the Business Model Canvas
- Be able to complete a Business Model Canvas to present a project idea

Presentation:

1. Theory:

Begin by introducing the trainees to a few basic elements of the relevant theory:

- Introducing the various types of financial support
- Fundraising tools for the planning stage: Business Model Canvas
- Video presentation - 2 minute overview of the Business Model Canvas:
<https://www.youtube.com/watch?v=QoAOzMTLP5s>
- Explanation of the BMC Steps

2. Presentation:

- Learners are split in groups of 5 (mixed)
- Each group:
 - brainstorm and defines a project idea
 - develops the project using the Business Model Canvas
 - presents its work in 5 to 7 min.
 - gives feedback on each project idea. Focus is given on how the project was planned using the business model canvas (not on the idea itself)
- Follow-up questions:
 - How did your project idea develop during the exercise?
 - What are the new aspects / new ideas or the new questions you raised in regards to your project using the business model canvas?
 - What can you say about the sustainability of your project, looking to the business model you developed?

5.2. Relationship Maintaining - Good Practices

In this section we showcase some examples of Best Practice in Communications and Donor Relationship Management, chosen partly from our own organizations, partly from others that seemed particularly effective among those we examined in the Research phase of this project.

5.2.1 Sending stories about the organization

Organization: Fundatia Danis, Romania

Activity: quasi-personalized emails with updates about the organization

Objectives:

- To stay in touch with the main business partners, sponsors, individual donors and other stakeholders;
- To give updates about the organization, in a creative and informal way.

Description of the activity:

The idea of the activity came like this: it was the end of the summer 2018 and we felt we were genuinely missing our main stakeholders, as the last time we had connected with most of them was on the occasion of a networking event we had organized at the beginning of April 2018; also, we felt that it was a good time to send people a motivational message, as we all might share the feeling of the end of the summer, when holidays are finished and we have to go back to work, gathering our energy for the last months of the year.

We decided to create a “back in time” story, looking back at the first eight months of the year, and collecting the most important stories from our organization, from each month. We used short pieces of text, photos and videos relevant for these stories, and we put them all together in an Adobe Spark page, which is a free, very useful tool for developing such stories in a very appealing format. Also, we made sure that we included relevant stories about the projects or events that had been supported by businesses, mentioning their names and saying thank you to them. For each project mentioned, we used links where the readers could access and find out more about the project.

Once we had prepared the Spark Adobe story, which we entitled it “Saying hi to you”, we sent quasi-personalized emails to approximately 250 people: business partners, sponsors, individual donors, other relevant stakeholders. The email was sent by two team members, the list being split in accordance with the relationships they had with the people from the list. We used a core email text, which was then adapted to different categories of recipients. For instance, we changed the way we addressed the recipients, choosing to use or not use their first names. For those who were closer to us, like our sponsors, we used their names and tried to include something special we knew about them, in the conversation.

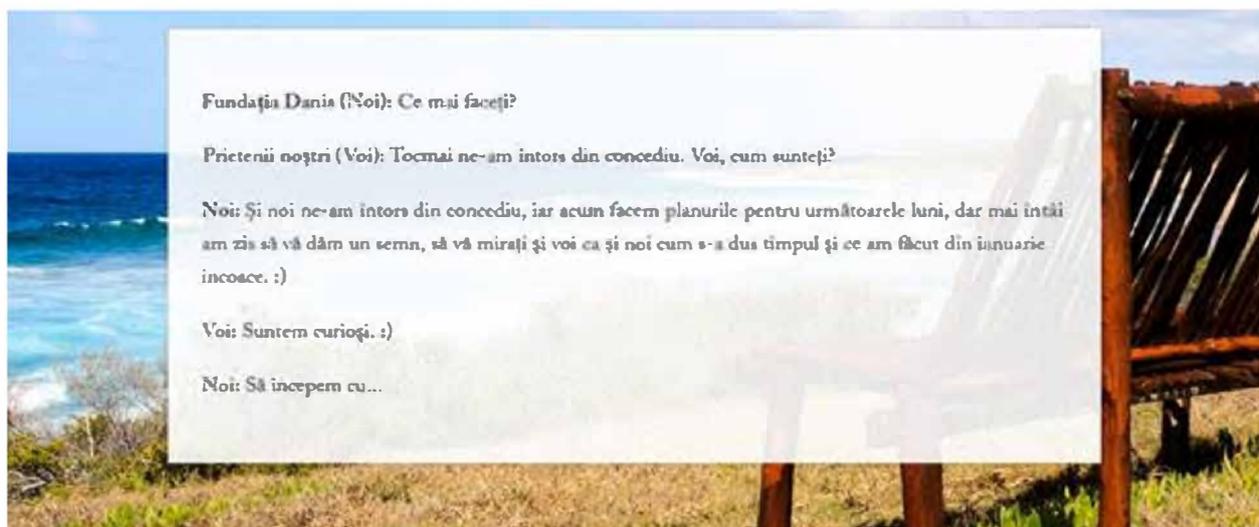
Here is an example of an email we sent to one of our business partners, a Dutch friend and supporter who lives in Cluj and runs a business in the city, and who speaks both English and Romanian. What we knew about him is that he usually travels a lot, to special places, with his wife and many friends.

Dear [Name],

How are you? I hope you have a wonderful end of the summer, in a special place, with special people around you. :)

Mainly I wanted to say hi to you, but also to share with you that here at Fundatia Danis we suffer from #backtoworkblues or #postvacationdepression. :))) So, to motivate ourselves, we looked back to what we did this year so far, and we were so happy to see how many wonderful people, like you, we had close to us. We invite you to go back in time with us, for 5 minutes, here: <https://spark.adobe.com/page/f4GIW2YXW1LzQ/>

*Best wishes,
[Sender name]*



As feedback, the story had 350 views in total (one of the many cool features about Spark Adobe is that you can see how many views you get), and here are some direct responses we received from the people:

“Hi, Cordelia! I totally understand you with the feeling of going back to work. The presentation is very cool, the template is new to me, for sure. Good luck for the rest of the year and keep in touch.” (CEO of Sykes Cluj-Napoca)

“The presentation is excellent, dears! Innovative, attractive and exciting! I did not know about this tool, I will also use it! Congratulations for the passion you put in everything you do.” (HR Manager, Compexit-Skoda Cluj-Napoca)

“Thank you for the relevant updates and I am looking forward to developing our collaboration in the future, with new initiatives.” (Owner of the startup Simbound)

5.2.2 Exquisite Day for Entrepreneurs

Organization: Fundatia Danis, Romania

Activity: one-day experience for entrepreneurs, with workshops for young entrepreneurs and networking event for young and experienced entrepreneurs from the community

Objectives:

- To stay in touch with entrepreneurs and CEOs from Cluj-Napoca, our main stakeholders as sponsors and clients for our entrepreneurship education Programmes;
- To promote ourselves as an organization that delivers 'exquisite' and a different, innovative kind of entrepreneurship education;
- To have the chance to meet new entrepreneurs from the city, especially young entrepreneurs who could benefit from our Programmes.

Description of the activity:

Under the label "Exquisite Day for Entrepreneurs" we designed a one-day experience for entrepreneurs from our community. In the first part of the day, we developed and provided entrepreneurship workshops, for which almost 50 young entrepreneurs enrolled, and we selected 17 of them to participate. The workshops were on: storytelling for entrepreneurs, design thinking for startups and behavioral economics in business decision-making. Then, in the second part of the day, in the evening, we organized a networking event, in which almost 80 entrepreneurs and CEOs from Cluj participated, including the young entrepreneurs who benefited from the workshops. These entrepreneurs were coming from companies that supported us before as sponsors, or had been part of our Internship Cluj programme, but also entrepreneurs and CEOs who were individual donors in the other Fundraising campaigns we ran in recent years, and entrepreneurs that were part of our entrepreneurship education Programmes such as Erasmus for Young Entrepreneurs.

During the networking event, to facilitate easy conversations between participants and give an entrepreneurship focus to the talks we invited several experienced and young entrepreneurs to deliver short speeches and tell their business stories; also, a young entrepreneur showcased his company, a film production studio, by projecting one of his short-movies, awarded in several European festivals; finally, an International Political Economist from City University of London and Copenhagen Business School, Cornel Ban, gave an online speech for the networking participants about the power of business networks to develop better communities. During the evening, small tasting events of sweets and special organic oils, developed by local businesses, were also organized.

All the costs of the event were covered by generous sponsors/businesses from our city, through in-kind support, such as some of the workshops, but also the training rooms, the event room, the food and drinks necessary during the day, office supplies and merchandise supplies. Most of these were covered by the main sponsor, an IT company.

You can check the agenda of the event (in Romanian) here:

<http://reports.fundatiadanis.ro/index.php/exquisite-event-for-entrepreneurs/>

Also, you can see the atmosphere from the event in this Facebook photo album:
https://www.facebook.com/pg/FundatiaDanisRO/photos/?tab=album&album_id=1933026963405846

5.2.3 Enhancing sustainable synergies: The example of ASSET tec - CityCampus

Organization: ASSET Technology, Greece

Activity: Partnership in the areas of Youth Promotion and Youth Information

ASSET Technology is an SME always open for new cooperations, especially in the field of Youth. In this sense it has made a number of synergies with Youth Organizations and NGOs which undertake Youth activities for the promotion of common goals. Below is an example of good practice in relationship management with the Youth Organization “CityCampus” from ASSET’s SME perspective.

Objectives:

- Establish a strategic relationship to promote each other’s activities and initiatives related to Youth
- Maintain a sustainable synergy in the field of communication and information for Youth

Description of the activity:

City Campus is an NGO active in the field of Youth. Having met at a number of events a discussion started, to investigate the potential of an official cooperation. After an exchange of emails to discuss each other’s activities and goals, a meeting was held between Asset Tech and City Campus representatives to define the framework of the cooperation.

In this meeting, the two organizations discussed and committed to carry out concrete activities. This original conversation was summarized in a formal way with the two parts agreeing on specific activities, such as:

- Mutual logo exchange to promote visibility
- Mutual promotion/publication of articles related to Youth (entrepreneurship, mobility, etc.)
- Cooperation in the framework of the StudyBuddy forum
- Posts on the site CityCampus.gr about Asset’s young entrepreneurs’ success stories
- Collaboration for the co-organization of information events for Youth



5.2.4 Beyond Project Reporting: Staying in Touch with Business Partners

Organization: Fundacja Samodzielni Robinsonowie (FSR), Poland

Activity : Examples of activities done by the organization's staff and their young project beneficiaries to stay in touch with companies that support certain projects.

Objectives :

- To stay in touch and build a relationship with business supporters throughout the project timeframe.
- To allow the beneficiaries of a project, who are young people from foster care, to learn to appreciate the support provided by the business partner.

Description of the activity:

Usually companies that provide in-kind and financial support for the realization of FRS projects demand a final financial and activity report from the organization, which needs to be provided, usually, once a year. From experience we have learnt that reporting to the company only once a year does not allow us to develop a personal relationship with the decision makers within the company, therefore diminishing the likelihood of receiving further support for the continuation of projects, or new projects. In order to prevent this from happening the project coordinators within FSR are implementing the following activities to keep in touch with companies within the project cycle:

- Provide updates by mail on project activities at least each quarter and/or when certain project milestones are reached. In order to make the company representatives feel involved, information is provided that social media post will be created or a news article will be published, asking the company also for their agreement. Later, links to social media posts or news articles are provided. Moreover pictures of events are added and short texts provided that the company can use for internal and external communication about the project activities. Providing an update by mail, can also include sending evaluation reports from project activities. In the case of FSR this means sending the Youth summer/winter camp report to the company, where individual activities are described and evaluations for each activity are provided by the participants, the Youth from foster care. This demonstrates transparency by sharing the negative feedback received as well as positive..
- Face-to-face meetings at least once a year with the company representatives, where updates are provided about the project supported by the company. Moreover, the meeting is also used to learn from the company in terms of what they need, which activities they have or plan to organize, which FSR could support. By asking what the company needs, the company representatives feel that FSR is genuinely interested in a partnership and not only in receiving one-sided support.
- Supporting company activities through the involvement of project beneficiaries: examples here include asking our Youth to volunteer during sports events that a company organizes, for example by giving out water to the sport tournaments/marathon participants. Another example is involving our Youth in supporting company family events, e.g. creating Christmas decorations together, where the Youth is responsible for helping children. Organizing such activities does not only allow FSR to keep and grow a good relationship with the company but also allows the young beneficiaries to learn about those who are supporting them, and learn that you have to give back for the support you receive.

5.2.5 Inspiring your Partners and creating a sense of community

Organization: SOAR (Ireland)

Activity: Send Quarterly Updates/Newsletters

Objectives:

- To stay in touch with business partners, sponsors, individual donors and other stakeholders;
- To give updates about the organization, in a creative and informal way.

Description of the activity: the newsletter is a good length and very colorful, with great use of pictures to tell the story. It highlights the number of Young People reached right at the start. It then also features items like:

- special events that took place during the period
- donors / CSR collaborations
- awards received
- a story by a member of staff about their motivation/passion for the work
- interactions with other people or organizations and more



Numbers Reached

In February and March we Reached:

Teenagers: **998**
Schools: **14**

Our New Crew Began Running Parts of Our Workshops

After many months of training, learning and observing, our new crew began to step out of their comfort zones to take small parts of our workshops. Guided by our Senior Facilitator team the new crew have been putting all that they've learned so far into action in front of Transition Year groups. It has been amazing to watch them stand in front of teenagers and bring their own experience and style to the workshop. It's an exciting new step for our whole team and we can't wait for what's next!

"I learned that I am beautiful and I don't need to think bad about myself. I also learned to be more confident."

- Young Person, St Joseph's College, Lucan

Soar had a Valentine's Lunch Date with Davy

On Wednesday 14th of February, we were invited to speak at The Davy Private Clients Ladies Lunch and we were certainly feeling the Valentine's love! The event was hosted by our incredible board member and Soar Champion March Curtin. March is wildly passionate about our girl's program 'Stripped', and used the event as a way of raising awareness about the work we're doing with young women. It was a powerful day where women inspired each other with their stories, passions and projects. We're delighted we got to attend and tell them about how we are empowering girls all over Ireland.



Liv Powell agreed to Come to Ireland to Train and Develop our Staff and Crew

Through our links and relationships with the Reach Foundation we have come in contact with Liv Powell. Liv is a highly experienced Facilitator and trainer who has spent over 10 years working with Reach. She is their current L&D Manager but has agreed to come to Ireland to spend 5 months with Soar to assist us in training our current facilitator team and our newly recruited crew. She will also help us with the development of a training and recruitment plan for new crew and future facilitators. With her presence, we hope to stretch our reach, develop our staff further and make greater impact for every teenager we encounter. Liv arrived in March and has already made big impact! We can't wait to see what else she brings.

Our Head of Wellbeing and Child Protection, Babs Leonard Celebrated 5 years with Soar

Babs first began working with Soar in a voluntary capacity 5 years ago this February before joining the team full time. Since then, she has brought undeniable strength and grounding to the organisation. Babs' role involves being directly connected to the process with young people, from start to finish to ensure that every teenager is supported throughout their Soar experience. She also leads on wellbeing and selfcare for teenagers, schools and the whole Soar staff. We count ourselves unbelievably lucky to have Babs' care, fun and love ingrained in all that we do in Soar.



Babs Leonard

In her own words:

"I've been so lucky to work in some incredible places with inspiring humans but I still felt that there would be something different at some point in my life. It would be different because it would be everyone together learning from each other, people who wanted more out of life, for themselves and for young people, people who stretched themselves by searching and seeking some bigger ground in life. And then I started working full time in Soar and it has been everything I knew it would be and more."



Soar got Elevated

The Elevate Foundation is a not-for-profit initiative which aims to reach out and connect with young people in Clare, through inspirational workshops and wellbeing programs. In 2017, Soar partnered with Elevate to provide workshops to schools within Co. Clare. In March 2018 we ran our first workshop in Shannon which was funded by the Elevate program. The feedback was incredible and we hope to roll out more workshops with Elevate across Clare.



Our CEO Tony also headed west to Doolin to run a workshop at Elevate Youth Fest, a day that saw 250 teenagers come together. He brought the energy, allowed young people to explore what they wanted out of life and they absolutely rocked it!

5.2.6 Holiday Greetings

Organization: Norsensus (Norway)

Activity: Send Quarterly or Annual Reports with Holiday Graphics on Social Media

Objectives:

- To update on our activities and stay in touch with our stakeholders and supporters;
- To give updates about the organization, in a visual and appealing way.

Description of the activity:

The organization sends quarterly and annual reports about its activities and their impacts, with the support of visuals. The reports, prepared as webpages, are shared on social media and sent as emails featuring:

- events that took place during that period
- number of people who were reached
- the geographical impact
- video contents
- holiday wishes
- call for support and contribution
- upcoming events

You can find two recent examples: one annual report and a Christmas video from these links:

<https://www.facebook.com/NorsensusMediaforum/videos/2198285153787867/>

<https://norsensus.no/reports/annual/>