

A Guide to Engaging Business for Youth Mentoring Organisations



Acknowledgements

A Guide to Engaging Business for Youth Mentoring Organisations was written by Whitelion on behalf of the Victorian Government. This Guide reflects the extensive experience and knowledge of community organisations that have shared learnings, contributed to discussions and provided case studies of successful community business partnerships. The contributors are gratefully acknowledged in the Appendix.

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Foreword

Mentoring really works. It is one of the most effective ways we can help a young person get their life back on track. I encourage all sectors across the community – businesses, community groups and philanthropic organisations – to support mentoring and join with the Government to improve the way mentoring for young people is delivered across Victoria.

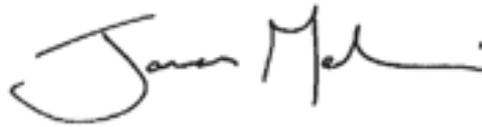
Mentoring organisations that approach businesses to get involved in mentoring have a strong case – not only is it great for the young people, it's great for the organisations and individuals involved. Businesses can support youth mentoring in a number of ways, from providing opportunities for young people's involvement in their business to providing funding, sponsorship, in-kind contributions for promotional activities and fundraising.

By encouraging staff to become mentors, businesses can benefit in two ways. Not only do employees feel great about helping a young person, but research suggests that there are also economic benefits for businesses through the additional skills their employees acquire in the process.

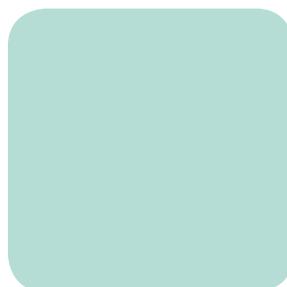
A number of large, well-established mentoring programs already have substantial and ongoing corporate support. The Victorian Government is working with employers to explore ways of building a more widespread culture of mentoring for young people in both large and small enterprises.

I am pleased to introduce this toolkit for community organisations that are keen to engage with businesses and work together as partners to support young people.

I commend you on giving Victoria's young people the mentor support they need to improve their lives through positive relationships and experiencing new opportunities.



James Merlino MP
Minister for Sport, Recreation and Youth Affairs



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Purpose of this 'how to' guide

2.1 Why engage with business?

Leading the Way: The Victorian Government's Strategic Framework on Mentoring Young People 2005 – 2008 provides a strategic approach to mentoring that supports the delivery of high quality and cost effective programs. For the long term success of mentoring, integrated and collaborative partnerships are necessary which is why the Victorian Government is working in partnership with business, schools, philanthropy and across all levels of government to improve young people's access to quality mentoring programs. Mentoring is seen to be a key strategy to provide early support for young people at risk, break the cycle of disadvantage and help young people connect with positive social and economic networks to increase their life chances.¹

Increasingly, a diversification of funding sources is becoming key for the long-term sustainability of community organisations. A community business partnership can assist you to diversify your revenue sources and find necessary resources beyond the government and philanthropic options.

2.2 What is a community business partnership?

A community business partnership exists where a business and community organisation identify common goals and agree to work together to share and leverage their strengths, knowledge and resources to benefit both the business and the community.²

Along with common goals, successful partnerships need to have some common principles that hold them together.³ Three commonly identified principles are:

- **Equity:** recognition that both parties have an equal right to enter into a partnership and have valid contributions even where there are divergences in power, resource and influence
- **Transparency:** partners will become truly accountable through trust generated through openness and honesty in the relationship
- **Mutual benefit:** both parties contribute to the partnership and should also be entitled to benefits. This will ensure parties remain committed to the partnership

Community business partnerships can range from a simple exchanging of money through to more strategic alliances. They can involve varying levels of resource commitment (financial, skills or time) and levels of interaction. Partnerships often have a mix of these resource commitments that will vary based on the needs of the community organisation and the

¹ *Leading the Way, The Victorian Governments Framework on Mentoring Young People 2005-2008*, Department for Victorian Communities, 2005, p.6

² Loza, J and Prince J, *The practical partnering toolkit*, Social Compass, The Prime Minister's Community Business Partnership, 2007, p. 5

³ Tennyson, R, *The partnering toolkit*, International Business Leaders Forum, 2003, p.6

Purpose of this 'how to' guide

capabilities of the business partner. The nature of the relationship may adapt over time as partners get to know each other and as their needs change.

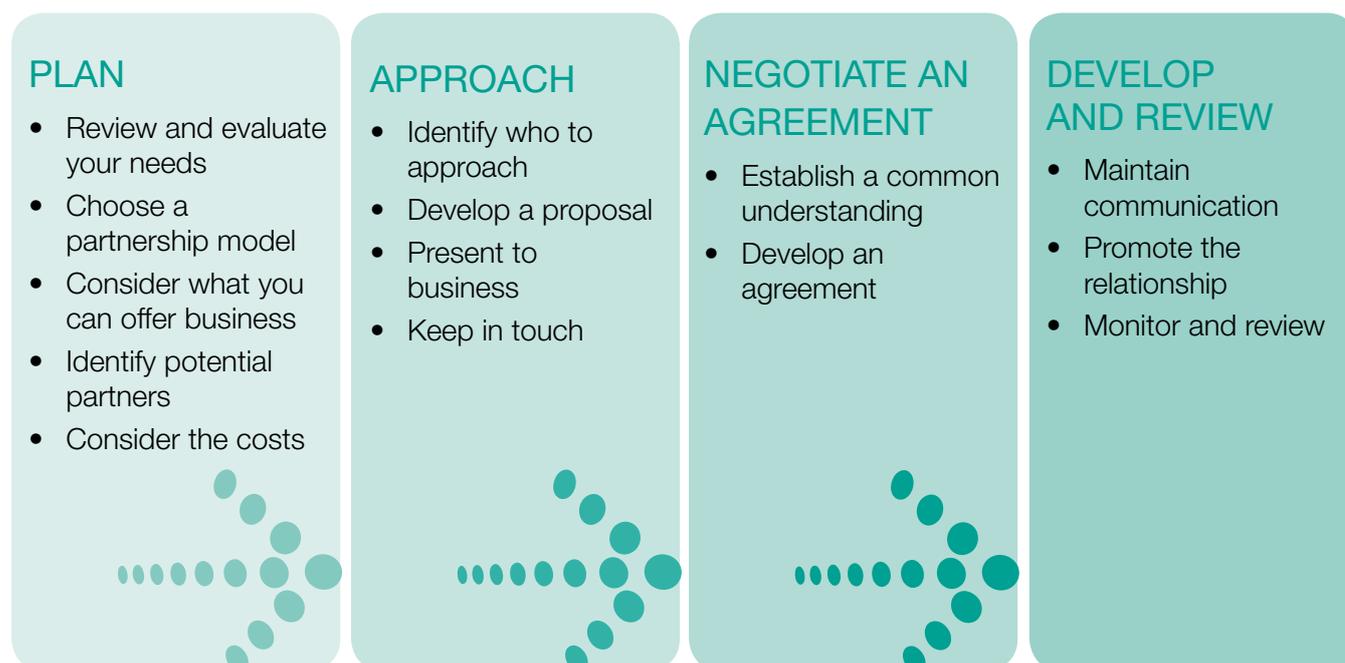
Community business partnerships can utilise the strengths of both parties to maximise the benefit to the whole community.

In 2006-07 approximately 40,000 young people were involved in more than 300 separate activities which included leadership programs, the development of youth websites and magazines, performing arts groups and film projects, youth forums and action committees and social or recreational groups.

The participation of young people was central to the planning, delivery and evaluation of these activities which gave them the opportunity to contribute to their community and ensure their voices were heard and valued.

2.3 How to use this guide

With the right preparation, partnerships can be easier in practice than they sound in theory. This guide provides you with a practical, step by step approach to establishing and maintaining a successful partnership. The steps are:



The Guide has been developed specifically for youth mentoring organisations. However it will also be a useful reference for thinking through developing other partnerships to contribute to activities and events run for and by young people.

The Guide is comprised of the following sections:

- “How to guide” to engaging business, complete with practical tools, and
- Engaging business: Proposal templates CD to assist in developing links with businesses large and small.

It is important to review the Guide and tools in full before initiating partnership preparation. This will give you a full picture of the partnership lifecycle and

enable you to assess whether it is the correct investment for your organisation.

There are many types of organisations and partnerships. This Guide contains tools which can be tailored to individual mentoring organisations. Long-term partnerships are the focus; however the steps included can be applied to all partnerships. The extent to which they are applied will depend on the size and complexity of the partnership. For smaller, relatively simple partnerships involving a limited resource commitment or one-off contribution it is important to consider each step and apply as appropriate for the scale of the partnership. This process can create a solid basis to grow the partnership in the future.

3

How business can support youth mentoring organisations

3.1 Why business wants to work with youth mentoring organisations

In recent years, there has been a profound shift in the way business interacts with the community. The traditional notion that the ‘business of business is business’ no longer holds true, and many companies now believe they should take a greater role in meeting the needs and aspirations of the communities within which they operate.

Businesses – large and small – increasingly see community investment as ‘an integral component to strategy and the business model’.⁴ Many businesses believe that responding to community interests and stakeholders needs, can actually improve long-term profits.⁵ Generally, businesses do not see involvement as a way to reap

short-term financial gains, but as a way to maintain trust and build support with the local community, government and the people it employs.

Gone are the days of business simply opening their cheque books. Increasingly businesses need to build a **business case** for engagement. Partnerships with community organisations can take on a variety of forms and have the potential to offer a wide range of benefits to business, and the community.

Business derives both internal and external benefits from partnering with youth mentoring organisations – both of which add value and sharpen competitive edge.

Benefit	Description
Internal benefits	
A more skilled workforce	Working with the community sector can broaden employee perspectives and develop skills not usually accessed in their day to day jobs. Partnering produces the opportunity for employees to enhance communication, teamwork and leadership skills. Exposure to youth issues in particular may help managers to understand and develop their young employees.
Improved understanding of the community	Involvement in local communities can improve their understanding of the community in which they work. This knowledge can inform and improve business decisions and potentially lead to fresh thinking regarding processes, logistics, workforce management and product innovation.
Improved staff morale and retention	Involvement in a partnership, particularly where staff involvement through volunteering, can improve staff moral, enhancing productivity and reducing staff turnover.

⁴ *Corporate Community Investment in Australia*, The Centre for Corporate and Public Affairs, the Prime Minister’s Community Business Partnership, 2007, p. viii

⁵ *ibid*

Benefit	Description
External benefits	
Being an employer of choice	In a tight labour market attracting and retaining committed employees has been increasingly important for businesses. Staff, especially young employees, place increasing demands on potential employers with many seeking to ensure that an employer's values align with their own and provide the ability for them to express their altruism with the support of their employer. ⁶
Improved reputation	A partnership with a youth mentoring organisation is a demonstration of a business's ethos and commitment to its community, setting it apart from competitors. Building a positive profile can improve your business's chances of attracting and retaining customers and suppliers.
Expanding networking opportunities	Expanding business relationships in the local community promotes trust and can create stronger relationships and alliances. Youth mentoring organisations may also be able to provide business with access to their government contacts.

3.2 Types of support business can provide

There are a variety of ways in which business can support and work with community organisations. The partnership between Whitelion and Metlink is an excellent example of how business can support an organisation in multiple ways, generating benefits for both partners and the community (Case study 1).

Where once support from business could be characterised by ad-hoc cash payments and arms length transactions, recent years has seen a shift away from these traditional forms of philanthropy to a more strategic approach centred

on creating a lasting contribution to the community – usually in partnership with a community organisation.

Whilst it remains relatively easy to approach business for a one-off cash donation, working with a business to develop deeper, more integrated partnerships can potentially provide greater rewards for both parties. Long-term partnerships, generally 3 to 5 years, have the ability to provide stability and the opportunity for lasting growth of your organisation.

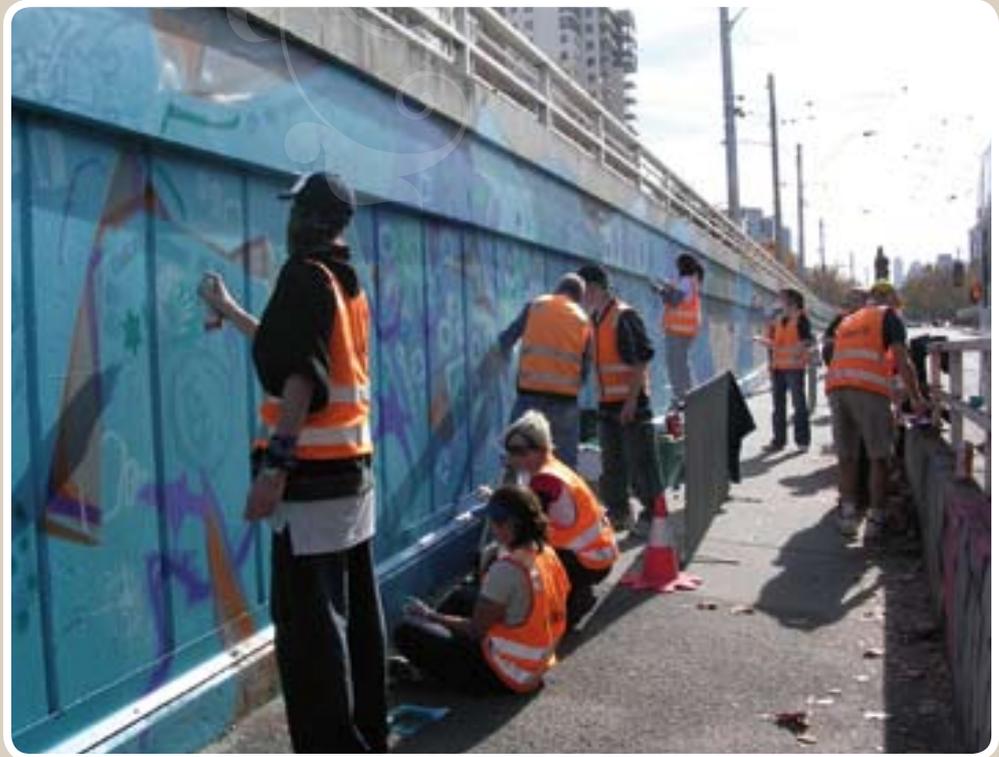
Businesses can partner with a mentoring organisation to provide one or more partnership element summarised in the table on the next page.

⁶ ibid

How business can support youth mentoring organisations

Partnership elements	For a youth mentoring organisation this may involve
Being an employer of choice	<ul style="list-style-type: none"> • One-off or ongoing donations for general use or targeted for specific programs • Allowing for employee payroll giving • Encouraging staff to support or run fundraising
Volunteering opportunities for staff	<ul style="list-style-type: none"> • Encouraging staff to become mentors • Allowing staff to take part assisting the organisation with other short or long term positions where resources are low
In-kind contributions of goods, services or other resources	<ul style="list-style-type: none"> • Short term in-kind donations for promotional or fundraising activities • Ongoing support such as the provision of office space
Pro-bono services or specialist skills	<ul style="list-style-type: none"> • Staff with specialist skills, for example accountancy, legal, human relations (especially training), public relations experts, providing their services for free
Quality work experience or work placements	<ul style="list-style-type: none"> • Creating employment positions for mentees
Acting as a distribution point	<ul style="list-style-type: none"> • Points to distribute marketing material about your program to encourage awareness and participation by mentors and mentees • Having a collection tin at your partners location
Establishing a scholarship or award	<ul style="list-style-type: none"> • Developing an award or scholarship which reflects mentee aspirations

The benefits of a partnership **Metlink and Whitelion**



Whitelion is a non-profit organisation dedicated to making a difference in the lives of young people at risk. Whitelion exists to reconnect disadvantaged young people with the community so that they can live positive and meaningful lives. It works to inspire and empower disconnected young people by providing positive relationships and life-changing opportunities through role modelling, mentoring and employment programs that are youth-focused, gender and culturally specific.

Metlink is the face of public transport in Melbourne. A partnership of Melbourne's train, tram and bus operators, Metlink provides customers with a 'one-stop-shop' for information about services, fares and ticketing. Importantly, Metlink is committed to making corporate social responsibility an essential part of its business strategy.

Metlink was particularly interested in working with young people as negative behaviours such as graffiti, vandalism, train surfing, fare evasion are prominent with this group. Through working

with Whitelion, Metlink hoped to gain a greater understanding and build relationships with young people, as ultimately connecting with this group could reduce the incidence of these negative behaviors.

Since the inception of the sponsorship in 2004, both parties have been committed to the partnership. Regular meetings, executive and staff involvement, support with fundraising events and achievement of clear performance indicators, has meant that the relationship has developed and strengthened.

Metlink and Whitelion work positively together in a variety of areas:

- As major sponsor, Metlink provides Whitelion with \$100,000 per annum in direct financial assistance and a further \$50,000 in servicing the partnership
- Public transport staff are offered the opportunity to understand more about the young people at

How business can support youth mentoring organisations

casestudy 1: continued

risk of, or involved in, offending behaviour on public transport. This has been developed into a new customer service training program

- Developed employment opportunities for young people seeking independence after incarceration
- Metlink operator staff have been given the opportunity to become involved with young people. Activities have included:
 - Activity days within Youth Justice Centres
 - Community day at an event held at Luna Park
 - Getting involved in Whitelion's programs - attending camps, becoming mentors and vocational training
 - Mural Art Days

This mutually beneficial relationship has generated positive results for Metlink, Whitelion and young people alike:

- **Metlink:**
 - Staff skill development (via the staff training package) through increased information and empathy with young people, a traditionally challenging customer segment
 - Improved satisfaction for staff as the sense of control and meaning has increased
 - Contributions of young people's graffiti art to renovations of key transport junctions

- **Whitelion:**

- Financial support of this scale has been critical to program function, outcomes and growth
- Promoting tolerance and support for our community's troubled young people
- Building an awareness and empathy in the community of Whitelion's work with young people at risk

- **Young people:**

- Greater opportunity to get involved in the mentoring and employment programs due to the additional funding
- Further access to training and skill development
- Increased appreciation of the challenges of operators of public services
- Exposure to positive relationships with members of the wider community

Whitelion CEO Mark Watt believes "Metlink's sponsorship of Whitelion has had a profound and positive impact on the organisation, providing much needed funding and professional guidance to support its work with young people and its growth in the past year."

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Planning a successful partnership

Partnerships can be extraordinarily rewarding. And developing the right type of relationship, with the right partner is crucial in forming a lasting partnership. A poorly planned partnership can drain resources and sap morale to the detriment of all concerned.

Before approaching a potential partner, carefully consider the following steps:

Step 1: Review and evaluate your needs

Step 2: Choose and develop a partnership model

Step 3: Consider what you can offer business

Step 4: Identify potential business partners who would provide the best fit

Step 5: Consider the potential costs of the partnership

If you have existing relationships with businesses, it is recommended that you evaluate your partnership (see section 7) and then return to this section to plan the next phase of your partnerships or any new partnerships.

tip: Successful partnerships generally have a champion within the business that drives engagement. This person may be:

- Someone known to your organisation through volunteering or another association
- An individual you come into contact with throughout the partnership planning process:
 - A manager within the organisation with a keen interest in the cause or community involvement
 - An effective employee whose responsibility it is to engage employees within the business

Step 1: Review and evaluate your needs

Youth mentoring organisations need to assess why they are considering approaching business – what will be the aim of the partnership, and what will enable your organisation to achieve what it currently cannot.

Utilising the information from your most recent program evaluation and organisation review, you need to ask:

- In which areas is the organisation failing to meet expectations?
- Where does your organisation want to be in the future?
- What additional assistance or resources do you need to ensure you meet your current and future expectations?

- What can be reasonably achieved through a partnership, and what needs to be developed internally or through a fee-for-service arrangement?

A model for mentoring organisations to evaluate their needs can be found in Appendix 8.2. It is a simple yet effective guide that should result in a list of needs where a business partner could provide effective support.

Planning a successful partnership

Step 2: Choose and develop a partnership model

Having identified your organisation's needs, the next stage is to decide what type of partnership model will best meet them.

A partnership with business can take on many shapes. In some cases, short term relationships with business can be beneficial where you are seeking funding of a specific initiative or the supply of particular goods and services is all you need. Cash donations can sometimes be the first step in establishing a partnership. As the relationship matures, your partner may be more likely to commit additional time and resources.

Indeed, the most successful relationships will be formed when organisations develop a long-term partnership and where a business is able to provide support on a number of levels. Creating long-term relationships with key business partners can reduce the ongoing costs of seeking and establishing new relationships, as well

as reducing the resources drain from maintaining high numbers of disparate relationships.

It is important to note that larger businesses are taking an increasingly strategic approach to community investment. They are becoming less reactive and fewer resources are allocated to ad-hoc or unsolicited requests for cash and in-kind donations. Many companies now have a fixed amount of resources allocated to community investment each financial year. In order to maximise the benefit they generate from these resources, they want to develop deeper and more meaningful long-term relationships with community groups.

When deciding on the most appropriate partnership model, be clear on which elements of the partnership would be the most valuable for you and which ones provide the greatest benefits to business.

Step 3: Consider what you can offer business

A partnership involves both mutual obligations and mutual benefits. Consider what your organisation can offer business. This could be a variety of things, but might include:

- Networking opportunities
- Skill enhancement through staff volunteering opportunities

- Allowing a member of the business to sit on the board
- Insights of how better to operate in the community
- Offering joint marketing opportunities
- Promoting their business to your supporters and community

You need to be realistic and honest about the extent to which you can offer benefits to business to avoid over-promising and under-delivering.

Step 4: Identify potential business partners who would provide the best fit

It is critical to the success of any long-term partnership that you identify partners with whom you have a 'good fit'. The partnership between Talent2 and Big Brothers Big Sisters Melbourne demonstrates the benefits of finding a 'best fit' partner (Case study 2).

Some key characteristics of good partners can be that they:

Criteria 1: Enjoy benefits from a partnership, particularly direct benefits

Criteria 2: Have the availability of the resources that you are looking for

Criteria 3: Share similar values or culture with your organisation

Criteria 4: Have a good track record in previous partnerships or has a willingness to engage in a partnership

As previously mentioned, having a champion within a potential business partner can significantly enhance your chance of creating a successful relationship. A champion should be able to assist you in identifying these characteristics within their organisation.

Criteria 1: Enjoy benefits from a partnership, particularly direct benefits

To identify potential partners consider which industries or businesses are most likely to derive the **greatest benefits** from a partnership. Organisations should seek partners whose business is tied closely to the social issues that the organisation is addressing and those that will directly benefit from what the organisation is achieving. Ideally, it would be best to focus on industries or partners where the direct benefit will affect their competitiveness where solving the social problem will reduce costs or increase revenues for the business (see Metlink – Whitelion partnership, Case Study 1).

Criteria 2: Have the availability of the resources that you are looking for

The size and nature of your organisational needs will determine the type of business you want to target. It is important to note that size does not tell you anything about a business' preparedness to get involved.

There are advantages and disadvantages to partnering with small and large businesses are outlined in the table below.

	Advantages	Disadvantages
Large Business	<ul style="list-style-type: none"> ✓ access to greater cash, human and other resources ✓ well developed Corporate Social Responsibility policies and structures ✓ heightened awareness of how to derive the greatest benefit from a partnership 	<ul style="list-style-type: none"> ✗ tend to focus on fewer, deeper relationships so may be less receptive to new opportunities ✗ have fixed budgets and are less likely to respond to ad hoc requests ✗ are more likely to focus on community organisations that share their state/national/international focus ✗ can be daunting to approach ✗ may be difficult for smaller programs to gain access

Planning a successful partnership

	Advantages	Disadvantages
Small to Medium Business	<ul style="list-style-type: none"> ✓ local business may derive more direct benefits eg exposure in local media, networking opportunities and local talent pool ✓ have a greater understanding of the local community ✓ greater buy in from staff who wish to build their local community ✓ more accessible and less daunting to approach ✓ may have a greater cultural fit and understand the constraints faced by community organisations 	<ul style="list-style-type: none"> ✗ likely to have more limited resources ✗ less experienced and may have reduced awareness of the benefits they derive from the partnership

Whilst the table above provides a general overview of the advantages and disadvantages of partnering with large or small businesses, you will need to consider the ability of the business to contribute the required resources and the likelihood that they will contribute on a business by business basis.

tip: In recent years there has been an increasing number of large companies that are creating **foundations**. They have generally been created as a vehicle for strategic community involvement and should be considered in addition to the operational business.

tip: Where you have a local office of a large business located in your area, you may be able to enjoy the best of both worlds. It can be useful to approach the area manager as they are much more likely to be aware of the local benefits of a partnership.

Identifying a specific need and finding a 'best fit' partner

Talent2 and Big Brothers Big Sisters Melbourne

Big Brothers Big Sisters was established in 1982. Since then, the organisation has provided thousands of vulnerable young people with effective guidance and support through one-to-one mentoring.

Talent2 is Asia Pacific's first end-to-end Human Resources Outsourcing company. Talent2 has been purpose built to provide innovative approaches to support clients in achieving their strategic HR objectives -from how talent is acquired, how talent is supported through systems and processes and how talent is optimised - in respect of learning and development, leadership and performance management.

In 2004, Big Brothers Big Sisters identified a range of limitations with its pre-match training for volunteer mentors. Training was failing to educate the number of volunteers needed. The reasons identified were:

- **The training was not timely:** the resource intensive nature of the training programs made it practical to run the classroom training sessions only four times a year. This inflexibility leads to long delays in getting started causing some potential mentors to lose interest
- **Difficult to determine a participant's learning:** even though some volunteers appeared to be participating and understanding the material, it later became obvious that they had not
- **The 'one size fits all' package does not suit all volunteers:** not everyone learns at the same pace and in the same way

Big Brothers Big Sisters sought to address these issues by introducing a component of its training program in an online (eLearning) format. To do so,



From left to right: Sarah Galbraith, Strategic Operations Executive at Talent2 and volunteer mentor with Big Brothers Big Sisters & Simon Kuut, Team Leader with Big Brothers Big Sisters.

Big Brothers Big Sisters looked to partner with an organisation with this expertise. Big Brothers Big Sisters approached several organisations that were online learning specialists with an invitation to partner. A senior executive from Talent2 got in contact almost immediately.

Both organisations worked together create aims for the partnership:

- Establish an online component to the training program which replaced approximately 50% of the content delivered in classroom based model
- Provide a means to administer 'learning checks' throughout the duration of the match and to identify areas where refresher training may be required
- Evaluate the new, 'blended' training program against the current classroom based program.
- Establish a starting point for future projects whether that is to improve upon the initial product and/or to develop additional online training modules

Planning a successful partnership

casestudy 2: continued

Talent2 provided on a pro bono basis its specialist skills to develop the eLearning program as well as ongoing training and help desk access. It is estimated that the online training program is worth approximately \$70,000 annually.

During the development of the eLearning product, an advisory group, including specialist Talent2 consultants, was set up. Talent2 offices were used to train Big Brothers Big Sisters staff, as well as to host the official project launch event. Talent2 staff members have also become volunteer mentors since the partnership was established.

Despite challenges of staff turnover on both sides, the partnership has strengthened and it is set to grow, with Talent2 recently assisting Big Brothers Big Sisters develop an online survey.

The online volunteer training program has enabled Big Brothers Big Sisters to deliver a more effective and meaningful training program to mentors. The benefits include:

- A new training program that has a much greater capacity to train volunteers than previous face to face training
- Decreased overall operational costs on a 'per match' basis

- Greater volunteer retention
- Increased effectiveness of group-based sessions as participants are familiar with the topics covered
- Increased ability to measure learning throughout the training process
- Increased capacity of Big Brothers Big Sisters to offer targeted and meaningful training once volunteers have been matched

The benefits for Talent2 include:

- Increased profile and reputation through promotion as a key partner for Big Brothers Big Sisters. Big Brothers Big Sisters advertises the partnership wherever possible; on its website, in Annual Reports and at events
- An increased business network through receiving referrals from Big Brothers Big Sisters networks
- Employee skill enhancement through staff translating their skills to another sector
- Greater staff insight into the not-for-profit sector and the community they operate within

All of these benefits add to Talent2's competitive edge.

Criteria 3: Share similar values or interests with your organisation

Most successful relationships exist where the vision, objectives or interests of the organisation and business can be aligned.⁷ To achieve this it is important to research the business's values, objectives, ethics, services or products and compare them with your own strategic intents.

In practical terms this may include visiting the company website to identify its mission statement and

corporate vision; researching current and back copies of their annual report; or reviewing press releases and sustainability reports. Alternately, speaking with a champion or a member of their leadership team could be invaluable.

The Reaching More Kids program identified that they shared a common goal with Loy Yang Power and used it as a basis for a mutually beneficial partnership (Case study 3).

⁷ Loza, J and Prince J, op. cit, p. 10

casestudy

3

From left to right: Mentee, Angus Thorpe and Mentor, Gary Tatterson from Loy Yang Power at the 2007 Youth Mentoring Week Event hosted by the Victorian Youth Mentoring Alliance Patron, Professor David de Kretser, A.C. Governor of Victoria



Identifying a common goal **Loy Yang Power and Reaching More Kids**

'Reaching More Kids' (*RMK*) is an early intervention project that supports young people, through a relationship with a trained mentor, to become more connected to education and social and community partnerships. The project is run by the *RMK* team at Berry Street Gippsland (Morwell), who develops and supports mentoring programs in Secondary Schools in the Latrobe Valley.

Loy Yang Power recognises the importance of positively engaging communities in which it operates, specifically to the local youth. Each year Loy Yang makes significant contributions, predominantly to the local community through sponsorship, donations and in-kind support.

Four years ago, *RMK* identified a common goal with Loy Yang Power of wanting to positively engage with young people in local communities and approached them as a potential partner when trying to establish a Youth Mentoring network for

the region. Since then, Loy Yang has supported the *RMK* program at Lowanna Secondary College, Moe. They provided initial financial support, participated meetings of the steering committee and actively recruited staff to volunteer as mentors during office hours. Currently, two employees have been trained as mentors and have mentored 5 students each.

Through its well established networks, Loy Yang Power has helped *RMK* to approach more Latrobe Valley power generators to get involved with the program. Whilst initially unsuccessful, Loy Yang Power is keen to try this avenue again to help grow the program.

Loy Yang Powers involvement in *RMK* has formed part of their Community Support procedure which ensures that the company makes positive contributions to sustain the local community.

Criteria 4: Have the availability of the resources that you are looking for

Be realistic about the level of commitment and involvement a potential partner will be looking for and ultimately agree to. If the business has a history of community involvement or has a formal community investment policy, they are more likely to be interested in partnering than those organisations that have not considered it before.

Some businesses will have set partnership programs which may set out who they will partner with and how. Whilst most companies are likely to be flexible even where this is the approach, it is important to bear this in

mind.

It can be useful to consider these questions at an industry or local level first and then identify individual companies. You can then narrow down your selection by completing a Scorecard (see Appendix 8.3) for each potential business partner to create a ranked shortlist of companies to approach. It can be wise to cast a wide net but approach those with the 'greatest fit' first.

Planning a successful partnership

Step 5: Consider the potential costs of the partnership

Sustaining partnerships uses resources from both organisations, particularly when the relationship is more than purely financial. Your organisation needs to be aware of the real costs of approaching, maintaining and growing the partnership. Your internal resource allocation should be proportional to the size of the partnership. It is important to be aware of the potential costs of entering partnerships to ensure that the benefits outweigh them.

Mentoring organisations will need to be able to identify resources to be used to develop and maintain partnerships. The skills needed will depend on the nature of the relationship, but some skills you may require are:

- **Sales:** Ability to approach a prospective partner and work collaboratively to structure a partnership
- **Account Management:** Act as the key point of contact for the business partner, maintain the relationship and think of innovative ways to grow the partnership
- **PR/Marketing:** Work with the business partner to promoting the partnership both internally and externally
- **Administration:** Provide regular reporting and updates on the performance of the organisation as well as obtaining feedback
- **Co-ordination:** Organise any systems or processes required for example volunteers and volunteering opportunities
- **Relationship building:** Ability to listen, have open discussions, recognise differences in interests, values, identify common goals and work collaboratively to make progress and seek feedback to review actions

For each of the areas you will need to identify an individual and develop work plan, set targets and timelines to achieve. Not all skills required need to be sourced internally – you may be able to leverage off your potential partner, utilise the skills of your existing volunteers and mentors, or find other third party suppliers. Potential third party suppliers that might be able to assist are:

- MCBI Regional Co-ordinators: provide a good starting point to identify where these skills can be located
- Good Company (www.goodcompany.com.au) and Pro bono Australia (www.probonoaustralia.com.au): connect skilled professionals with charitable organisations in need of pro bono assistance
- Our Community (www.ourcommunity.com.au): offers a community – business brokering service
- Williamson Leadership Victoria (www.leadershipvictoria.org): through the SkillsBank service can provide a Fellow to join the team to work with the organisation on a particular projects

Increasingly, non-profit organisations are creating 'Corporate Partnership Teams' whose role is to increase the number of partnerships and then manage and develop the relationship.

Business, particularly large business, rigorously measures performance within their organisation and are likely to expect the same from the partnership. The benefits to the organisation, community and business partner may not always be easily measurable. Where possible, you need to have an review structure in place. The time and costs of setting up and gathering this information needs be considered.

The extent to which the resources of each partner are used can be negotiated with the business in the agreement phase.

5

Approaching business

Having identified a target business or businesses, it is important to become as familiar with the company as possible. The first contact will leave a lasting impression and it is important to make it positive.

In order to get the partnership off the ground you need to:

- Identify and approach the correct person and organise a meeting
- Develop a convincing proposal
- Present your proposal

As partnerships rely on personal relationships, often even the most basic details of the partnership are not recorded. Ensure your organisation has a written log of the partners approached and the updated status of the relationship. A simple template can be found in Appendix 8.4.

5.1 Identify who to approach within a business

As previously discussed, identifying a 'champion' or having someone with personal experience of your organisation within a business can be invaluable. Utilise your networks, personal or organisational, such as the Board or your existing volunteers, to see if anyone has an existing relationship with someone at the business. Attending business networking functions in your local area or for specific industries can be a good way to introduce yourself. Where possible, ask the champion or contact to help you approach the business.

The responsibility for community investment will vary depending on the size and structure of the organisation. If you are 'cold calling', ask for the person responsible for community engagement. Never send correspondence addressed 'To Whom it may Concern', a response is much more likely if an individual is referenced.

Increasingly in large businesses, corporate community investment strategies are set at a Chief Executive Officer or board level. The decisions on specific initiatives are generally made by a dedicated Partnership Manager or Corporate Social Responsibility Manager. If you are approaching a large business, it can take time!

However, in a small to medium size business, community investment decisions are generally the responsibility of the Corporate Relations Manager or the Human Resources Manager. Where the business is still 'owner managed' the community investment decision can depend heavily on the owners interest in the cause.

The initial contact should outline your intentions and try to organise a time for a more formal meeting to present and discuss your proposal. Whilst it may be helpful to send through some information prior to the formal meeting, it is best that you are able to meet with your potential partners to discuss the proposal face to face.

Approaching business

5.2 Developing a proposal for business: How to inform and connect

Your approach to business will depend on the size, nature and objectives of the business you are seeking to partner with. Larger, more corporate businesses are likely to expect a formal presentation accompanied by slides using the language of business. Smaller, more localised, less formal businesses may expect a more relaxed approach, perhaps in the form of a written proposal they can review.

To accommodate these approaches, two electronic proposal templates can be found on the Guide CD:

- PowerPoint proposal
- A4 proposal handout

The fundamentals and purpose of the approaches remain the same – to establish a starting point for a mutually beneficial partnership. The business will want to know:

- Why should they invest in your mentoring program? What value do you create?
- What can they do to address your organisation's needs?

Each proposal has been created as a generic document. And each contains guidance on the types of information which should be included. These proposals are not designed to cover every conceivable mentoring model or objective. They do however provide the basis for a solid proposal.

With this in mind, you will need to **customise** these proposals using information about your organisation as well as the business you are approaching. The pitch needs to communicate to the business that you have specifically selected them as a potential partner. Simply taking the

time to include their name, logo and evidence of their values can be the first step in demonstrating this.

When deciding on the most appropriate partnership model, consider not only the elements of the partnership which would be the most valuable for you but also which ones would provide the greatest benefits to the business. Be clear that the partnership model chosen will deliver the best result for both the partners and the community.

tip: These documents are marketing your organisation and should reflect your organisation's brand and values.

When creating your proposal **remember your audience.** Ensure that you:

- Keep the language you use simple, clear and jargon free, not technical or ambiguous
- Remember that your audience is a potential partner – your language should not be passive and represent that a partnership has mutual responsibilities and benefits
- Where possible use real case studies, examples and pictures to bring your organisations work to life
- Ensure that the document is clearly laid out and easy to read. Use diagrams, charts and tables that can communicate your ideas succinctly
- Where possible be brief to encourage questions and stimulate discussion
- Plan to present for approximate 30 minutes and allow 30 minutes for questions

5.3 Presenting to business

Presenting to business of any size can be a daunting task. It can be helpful to remember that businesses are generally keen to engage with community organisations and are looking for ways to demonstrate their commitment to addressing social problems. In fact in a 2000-01 survey of business, 31% of Australian businesses did not donate as they had not been approached.⁸ You have the knowledge and expertise of these social issues and are offering them an opportunity to get involved.

tip: Remember that you are not entering the partnership for your own personal benefit but on behalf of your clients and the local community.

Demonstrate the passion for the cause and the exciting opportunities the business could be involved with. Choose the best representative to get these messages across – this could even be a Board Member. The presenter should possess:

- Strong interpersonal skills with the ability to deliver an engaging presentation
- A thorough understanding of the social issue, the values and activities of the organisation to be able to answer questions confidently
- Strong sales and negotiation skills and preferably experienced in delivering a pitch

A seamless presentation will help to engage your potential partner. Ensure you:

- **Get to know your material** as it will help you to feel comfortable, confident and help the presentation to flow more naturally. However, try not to memorise your proposal as it may start to lose energy and life
- **Rehearse your presentation** (with your slides if appropriate) in front of a colleague and ask for honest feedback on presentation style. Remember when delivering key points, such as the ask, to pause to increase the impact of your message. Keep practicing until you feel comfortable
- **Speak to your audience** rather than your slides. Face your audience and make eye contact, not only will it make will make your presentation more engaging but it will be easier to hear you
- **Know your equipment** if you are using a computer and projector and try to get a trial viewing your presentation before the meeting. If this is not possible, enquire about the technology and ensure your presentation will be compatible. Always have a back-up presentation saved on a CD or USB flash disk in case you need to switch technology at the last minute and remember to take backup print-outs in case all else fails

By the end of the meeting you should have clarity on what the next steps are. Where possible, try to assign the responsibility to one person and set a deadline. Be prepared to leave some paper copies of your presentation or other materials for the business to consider.

tip: To help engage your potential business partner highlight any upcoming events or open days that they might be interested to attend.

⁸ Generosity of Australian Business, Australian Bureau of Statistics, 2000-01, p. 3

Approaching business

5.4 Keeping in touch

Following the proposal meeting, keep in touch with your potential partner. Call your key contact within a few days to thank them and the business for their time, confirm the outcomes of the meeting including your understanding of the next steps.

Make sure you keep in regular contact with your potential partner. Businesses receive many requests and a timely follow up call

can act as a valuable reminder. Avoid emails where possible, a phone call is more likely to build the relationship. Respond to any further requests promptly as they may be using this time to get to know you and your organisation, assessing whether they will be able to work with you.

Keep other members of your organisation or Board informed of your progress in engaging businesses to help maintain the momentum.

casestudy

4

Keeping your partnership on track **AMP Foundation and the Smith Family**

As a national, independent non-profit organisation, The Smith Family is

committed to unlocking opportunities for financially disadvantaged Australian children and their families to participate more fully in society, using education as the key.

The Smith Family's *Learning for Life* suite of education and learning programs provide disadvantaged students with financial scholarships to assist with school expenses and access to a critical network of personal support and development programs, including mentoring, tutoring and coaching which together help to break the cycle of disadvantage.

AMP Foundation's strategy is to invest in youth employment and community involvement, and to engage the skills and talents of AMP employees to support high impact social ventures. The AMP Foundation provides \$1 million annually to the *Learning for Life* program which supports seven *Learning for Life* locations and diverse programs including mentoring and school to work transition.

Since becoming partners in 2004, AMP Foundation and the Smith Family have been working collaboratively to maximise the benefits for the partnership. A key element of deepening the level of engagement is by increasing the opportunities for employees to engage with The Smith Family.

AMP employees are encouraged to volunteer for a variety of Smith Family programs, including:

- The *iTrack* Program - mentoring high school students to assist them making choices about their careers
- Sponsoring *Learning for Life* students
- The Smith Family Christmas appeal - sorting, packing and delivering Christmas Hampers for families

What has worked particularly well in the relationship is the preparedness to experiment with some programs and to be willing to take a risk with new ideas and products. Currently, over 40 AMP staff are taking part in the *iTrack* mentoring scheme. The program has been remarkably successful with staff indicating that they believe the program to be worthwhile and feel like they are able to make a positive contribution to their mentee.

Work programs have been jointly agreed each year keeping in mind AMP Foundation's focus and The Smith Family's program support needs. When setting up the partnership, the organisations agreed project outcomes sought, and progress reports have been provided on a quarterly basis. Over time this process has become increasingly rigorous. Formal reviews are undertaken on an annual basis to evaluate the impact of the partnership and develop plans for the future.

6

Negotiating an agreement

It is unlikely that the business will accept your proposal without further investigations or discussions. Well managed negotiations are important and through this a stronger partnership is likely to evolve. Developing a relationship to a true partnership can take time. Although it will depend on the size and nature of the relationship, it may take six months for the parties to start acting as partners.

6.1 Establishing a common understanding

In follow up meetings and discussions it is important to establish a common understanding of the partnership. You need to fully understand your partners' motivations and ensure the partnership agreement takes these into account. Things to discuss and establish together are:

- A **shared vision** for the partnership – what are you hoping to achieve together
- **Objectives** for the partnership – what you hope will be achieved or changed through working together. Try to ensure that these objectives are SMART:
 - **S**pecific – clear and well defined
 - **M**easurable – possible to measure whether the objective has been achieved
 - **A**chievable – ensure it is attainable and feasible
 - **R**ealistic – possible within the resources and time available
 - **T**imely – within an established time period
- The anticipated **benefits** to both parties and the community, how these are going to be measured and by who

- The anticipated **commitment** of resources from both parties
- **Roles and responsibilities** of each party - how the resources work together
- How you will **communicate** – who are the key points of contact, how will they communicate together and how often
- How you will **make decisions** and **manage conflict**
- A **timeline** for the partnership and the exit strategies
- How you will **review** the partnership and measure partnership success
 - Ensure that you have established Key Performance Indicators (KPIs)
- Under what circumstances the partnership will end and the **exit strategy** (such as how quickly it will cease and steps to be taken)

Before finally committing to a partnership, it may be helpful to answer the Successful Partnership Checklist (Appendix 8.5) with your business partner. This should confirm that your partnership is set up for success.

6.2 Developing an agreement

It is strongly recommended that you get a partnership agreement in writing no matter how small or fleeting the partnership is. Whilst the thought of drawing up a structured document is not necessarily appealing, it can be an important step to make certain both parties share a common understanding. It is recommended that you seek legal advice regarding your individual circumstances.

7

Developing and reviewing the relationship

Maintaining and growing a successful relationship involves commitment from both partners. Over time, partnerships can develop and deepen to generate greater benefits for all involved.

The partnership between the AMP Foundation and the Smith Family demonstrates that through regular communication, setting and reviewing of partnership goals and engaging employees, a deeper, more successful relationship can be shaped (Case study 4).

7.1 Maintaining communication

Communication is the single most important factor in maintaining a successful relationship. Effective communication ensures that stakeholders are kept informed, ensures the relationship is top of mind, builds trust, assists in raising potential conflicts early and helps to maintain focus on creating successful outcomes.

At the beginning of a partnership it can be useful to develop a **communications plan** that identifies:

- a point of contact within each organisation that will take responsibility for communication
- what information each stakeholder needs
- frequency/flow of information (daily, weekly, bi-monthly, quarterly, yearly)
- contact preferences (phone, email, meetings)

This plan should include regular partnership review meetings to ensure that the original focus of the partnership is still relevant and being worked towards.

You should try to foster a relationship with **open and honest communication**. You can help to create this type of relationship by:

- acknowledging and learning from mistakes
- providing direct feedback and be prepared to listen to feedback from your partner
- delivering on your promises and going the 'extra mile' when necessary
- making decisions about the partnership jointly
- considering and respecting the constraints within which both partners are operating
- recognising and celebrating success

Communication is an area where organisations can over time become complacent. Through changing personnel or over familiarity, contact with your partner can become more sporadic. It can be a costly mistake if your partner begins to feel undervalued and exits the partnership.

Engaging employees is important to ensure longevity **AMS and Whitelion**

Alexander Mann Solutions (AMS) works with clients to consolidate and transform their recruitment processes. AMS attended a Business Networking Breakfast hosted by Whitelion in 2006, which marked the beginnings of the relationship.

AMS and Whitelion worked together to achieve 3 aims:

- provide young people with opportunities that would otherwise have been out of reach
- raise money to support the Whitelion's programs
- increase awareness of Whitelion and their programs to increase participation

The main focus of the AMS–Whitelion partnership was to develop the “3 Peaks Challenge” fundraising event. The partnership organized the “3 Peaks Challenge” event - walking to the highest peak in 3 states, in under 33 hours. Covering 42kms and 6,000m in height, it tests the physical, mental, and emotional boundaries of all involved. AMS employees worked tirelessly to organise the event and ensure that fundraising targets were met.

The Challenge involved young people from Whitelion's ‘Young Lions’ leadership program as well as numerous AMS employees. Through the Challenge, several AMS employees have become interested in the work of Whitelion and provide ongoing volunteer support.

The benefits to AMS have been:

- Increased employee morale and engagement through coming together as a team to achieve their goals
- Broader employee skills through applying their skills to a new sector
- Improved understanding of young people and the community they are working in, enabling them to make more informed business decisions, particularly when young people are involved



The benefits to Whitelion:

- Donations valuing \$35,000 per annum – enough money to cover ‘Young Lions’ program for a quarter
- Additional resources through AMS employees volunteering their time
- Opportunities for the Whitelion young people to be involved in activities or services that would not have otherwise been available
- Improved employee morale through being involved in a life changing event

A further benefit to Whitelion is that they have been able to leverage the AMS partnership and the Challenge to further engage and strengthen relationships with other businesses such as the Colorado Group and Mercer.

Moving forward, AMS is looking to continue to grow and develop the partnership, building on the success of the 3 Peaks Challenge as well as developing a Training program for young people entering the workforce for the first time.

Developing and reviewing the relationship

7.2 Working with business to promote the relationship

Promoting your partnership to employees within the business and to the community is key to maximising the benefits of the partnership. Many benefits of the partnership for your business partners are likely to relate to corporate reputation. If the wider community are not aware of or staff not engaged with the partnership these reputational benefits are unlikely to be realised.

Increasingly, businesses are recognising the benefits of **getting staff involved** in partnerships – improved morale, reduced staff turnover, improved teamwork and broader skill sets. Marketing the partnership to internal stakeholders is key to getting them engaged and involved with the

partnership. Also, through engaging more staff, your partnership is likely to become more entrenched, increasing its ability to survive the turnover of key staff.

The partnership between Whitelion and Alexander Mann Solutions demonstrates how engaging staff can promote a successful ongoing partnership (Case study 5).

Through a community partnership, a business often hopes to improve its profile and reputation within the community to become the employer, supplier, neighbour or business partner of choice.⁹ Promotion of the partnership can also be beneficial to the youth mentoring organisation as association with a reputable business can increase the profile of the organisation within the community.

The table below outlines some ways to assist your business.

Internal engagement	Community promotion
Keeping your partner up to date with developments of your organisation so they can communicate this (via the intranet, newsletters or meetings) to staff so they remain motivated and encourage colleagues to get involved	Including the partnership in printed materials and on your organisations website
Providing your partner with case studies of the organisations success stories	Facilitating informal networking opportunities for business staff with other members the community involved with your organisation
Offering your time to talk to staff about the work of your organisation and its work	Enter your partnership in Awards: for example Local Council Awards
Holding an open day for staff where they can see how your organisation works, meet some of your staff and mentees	Using links with Local media to promote any events or report successes of the partnership

The Standing Tall and Iluka Resources partnership recognised the need to promote the relationship, both internally and externally, which has ensured that

the benefits to the organisations have been maximised (Case study 6).

⁹ *Corporate Community Investment in Australia, The Centre for Corporate and Public Affairs, the Prime Minister's Community Business Partnership, 2007, p. 46*

Promoting the relationship maximises partnership benefits

Iluka Resources and Standing Tall

Iluka Resources is a Western Australia based mining company. Stakeholder engagement is an integral part of the Company's business as it allows the organisation to understand and address the expectations of the communities it operates within.

Standing Tall is a school based mentoring program which recruits and trains members of the community to act as mentors to students at Baimbridge College and its' feeder primary schools in Hamilton. The program aims to help students fulfill their potential by taking full advantage of the educational opportunities offered by the schools.

Iluka and *Standing Tall* share a common goal of developing opportunities for young people. The *Standing Tall* Program coordinator approached Iluka for program support. The company was given a number of options ranging from financial support to allowing employees to volunteer.

An agreement was reached where Iluka allows time release for employees interested in becoming mentors to take part in training sessions and attend weekly mentoring sessions. Iluka also agreed to help promote the program within the community. *Standing Tall* provides the screening, training and support for mentoring relationships. *Standing Tall* also helps to promote the partnership, both within Iluka by running information sessions for employees and creating an information pack, and in the community by acknowledging Iluka in all published materials. A formal agreement that outlines the commitment by both parties was developed and signed by the partners.

Standing Tall has greatly benefited from the partnership:

- 7 students have been mentored by Iluka staff
- It's higher profile in the Community, especially through winning a Community Enterprise Award at the local Business Awards, has been raised significantly
- Other businesses have given in kind support as a result of the Iluka partnership



From left to right: Mentors from Iluka Resources are Glen Darroch, Tamara Milne, Laura Thornton and John McKay.

- An employee has joined the Management Committee for *Standing Tall*
- Students in the program have been able to engage with Iluka through a visit to the site

Iluka has also generated benefits from the partnership:

- Significant increase in profile and reputation of the business in the local community - far beyond what was anticipated
- Increased employee morale - employees participating has expressed a sense of satisfaction from being involved
- Increased employee skills and personal development through training and the mentoring experience

Iluka believes that the partnership involving staff volunteering has been very effective and looks forwards to getting more employees involved in the future.

Developing and reviewing the relationship

7.3 Monitor and review

Whilst there is likely to be ongoing monitoring of performance throughout the year, a formal partnership review should be completed at least once a year. A review should tell you how the partnership is working in practice and whether it is achieving its original vision and objectives. A review can also inform you about how the program might be improved and also highlight any areas where there may have been changes with roles and or interests.

The review process can be broken down into 5 steps:

Step 1: Clarify the aims for completing this review

Step 2: Identify the areas you want to review

Step 3: Identify how these areas will be measured

Step 4: Gather and analyse the results

Step 5: Hold the partnership meeting and decide on any actions to be taken

A simple review format has been created (see Appendix 8.6) to step you through the review process. Where a review is more intensive the same steps can be followed yet a more detailed report is likely to be required.

Step 1: Clarify the aims for completing the review

Jointly make a list of the reasons the partnership is completing the review. It could include things such as to:

- Gauge how both partners are feeling about the effectiveness of the relationship
- Identify the impact and success of the partnership
- Identify any areas of weakness and try to address them
- Confirm that parties are meeting their commitments and deriving the anticipated benefits
- Make revisions to the partnership arrangements to improve outcomes

Step 2: Identify the areas you want to review

From your review aims, identify the areas that you should be reviewing. To do this, compile a list of areas to investigate related to the aim. For example:

1. Review Aim	2. Area to Review
Gauge how both partners are feeling about the effectiveness of the relationship	<ul style="list-style-type: none">• Identify if both partners believe in the shared vision and feel like they are working towards it• Do both parties feel like they can communicate as equals• Are decisions being made jointly and issues and disputes being raised quickly and addressed efficiently• Are both parties being flexible and working together when faced with new circumstances

Step 3: Identify how these review areas will be measured

For each area to review, you need to identify:

- **How** you will review – does it require:
 - feedback from individuals, or
 - data to be sourced
 - > Where individuals are to be asked for feedback, who should be asked – e.g. managers, staff, mentees and community leaders
 - > **How** these individuals will be asked – generally through interview, work shop or questionnaires

Step 4: Gather and analyse results

The relevant stakeholders will need to be interviewed or surveyed and the data collected. The responses and data need to be analysed, drawing out the main themes for each area.

A preliminary report of the findings should be distributed to the key stakeholders ahead of the review meeting. Identify how the partnership has evolved from its conception, as well as any areas of particular strength or weakness along with recommendations for improvement.

Step 5: Hold the review meeting and decide on any partnership revisions

Ensure all the key stakeholders from both partners are able to attend the review meeting. Address the key findings of the review ensuring that any successes are acknowledged. Focus on any areas requiring improvement or review and discuss potential solutions.

Based on the review findings revisit the original partnership vision and assess if the partnership is still valid and worth continuing.

If 'yes': review the original partnership agreement and adjust where necessary:

- the vision and objectives
- partnership structure or commitment levels
- roles and responsibilities

If 'no': it is important to ensure that so far as possible, the partnership can end amicably. To facilitate this:

- ensure a formal letter of termination is sent to your partner
- create a document that:
 - identifies the achievements of the partnership
 - acknowledges the contributions of key individuals
 - outlines any lessons learnt
- ensure the partnership termination is communicated within both organisations and any other stakeholders in the community



Appendices

8.1 Glossary: Understanding the language of business

When talking to business about community business partnerships, they may use unfamiliar terms. Below is a list of business terms that may help out during these discussions. It is important to establish a common language so seek clarification where there appears to be confusion.

Best Fit: In the context of community business partnerships, best fit means the ability for a business or community organisation to find the most suitable community business partner. This process involves business and community organisations analysing what they can offer a partnership, what they want to gain and what benefits the partnership should generate for the community.

Business case: A business case is used to justify an investment where a business's resources will be consumed. It captures the potential costs and benefits of a project or venture and will ensure that the business's interests are considered when making the investment decision.

Corporate community investment (CCI): CCI refers to the all forms of support a business can provide including charitable donations, community projects, employer supported volunteering, community sponsorships and gifts in-kind.

Community organisation: are general those which have been established by a group of people with a common interest to deliver a variety of projects, programs and services for the benefit of the community. Community organisations generally focus on a community issue which addresses disadvantage or promotes community cohesion.

Deductible gift recipient (DGR) status:

For a donor to receive tax deductible gifts, the organisation must be endorsed as a DGR. Organisations that are eligible to become DGRs are determined by Australia's income tax law.

Foundation: A public or private trust which is not a charitable organisation but is established and operated for charitable purposes. No part of the income generated by a charitable foundation can be paid to any trustee, trustor or member.

Income Tax Exempt Charitable Entity (ITEC) status: When an organisation is endorsed by the Australian Tax Office to be exempt from income tax.

Key Performance Indicator (KPI): Key business statistics such as number of new orders, cash collection efficiency, and return on investment, which measure an organisation's performance in critical areas. KPIs show the progress (or lack of it) toward realising the firm's objectives or strategic plans by monitoring activities.

Memorandum of Understanding (MoU): A MoU is a formal agreement or understanding defining how partners will work together. It can be a statement of good intent for a partnership or can be a tool for action for the partnerships work.

Net present value: Net Present Value is an indicator of how much value an investment or project adds to the value of the firm.

Return on Investment (ROI): Usually expressed as a percentage, ROI is the ratio of money gained or lost on an investment relative to the amount of money invested.

Partnership: Where one or more businesses and one or more community organisations, with common goals, agree to work together to share and leverage their strengths, resources, talents and knowledge in a way that benefits both the business and the community. Successful partnerships tend to be equitable, transparent and have mutual benefits.

Partnership Model: The structure around which partners base their arrangement. The model may be single dimensional, for example an in-kind donation of a good, or multi-dimensional, including a number of multiple resources.

Pro-bono: is a phrase derived from the latin meaning 'for the public good'. It usually refers to when professional work is undertaken without payment.

Prescribed Private Funds (PPFs): A prescribed private fund is a trust to which businesses, families and individuals can make tax deductible donations. The fund may make distributions only to other deductible gift recipients that have been either endorsed by the Australian Tax Office or are listed by name in the income tax law.

Small to medium sized enterprise (SME): SMEs can be defined by annual turnover and/or number of employees. The Australian Bureau of Statistics defines a small business as one that employs between 5-19 employees; and a medium sized business between 20 and 199 employees. The way in which some companies structure their businesses (e.g. franchises, site-based operations and subsidiaries) can mean that operationally, franchises and some business units within a multi-national company can operate as an SME.

Stakeholders: are parties who affect, or can be affected by, the business's actions. A business's stakeholders often include the owners – private or shareholders, government, staff, trade unions, customers, creditors and the local community.

Shareholders: An individual or corporation that legally owns one or more shares of stock in a company. Shareholders collectively own the company and therefore strive to enhance the value of the company.

8.2 Needs Identification Tool

AIM: A simple, yet effective manner to quickly identify the key areas where further support is required by the youth mentoring organisation.

Please complete the following process:

Step 1: Identify the key processes within your mentoring organisation (an example has been created below) and note the steps involved

Step 2: Rank your "Internal competency" for each step in the process, for example High (H), Medium (M) or Low (L)

Step 3: Review your ranking, and highlight the areas of low performance. Consider the reason for the underperformance and create a list for further review

Step 4: For each area in the list, identify whether a partnership with a business could be an effective contributor to improving performance – sometimes it may be more efficient to develop internal resources or through a fee for service arrangement

The output of this process will be a list of the needs within your organisation in which a business partnership may be effective.

Appendices

Needs Identification Tool

Stream	Key Steps – Example Only							
Mentoring Program X	Develop Program	Identify Mentees	Source Mentors	Train Mentors	Match Mentors	Manage Rel'ship	Manage Exit of Rel'ship	Evaluation of program & stakeholders
Internal competency	H	H	L	M	M	H	L	M
Mentoring Program X	Develop Program	Identify Mentees	Source Mentors	Train Mentors	Match Mentors	Manage Rel'ship	Manage Exit of Rel'ship	Evaluation of program & stakeholders
Internal competency	H	L	L	M	M	H	L	M
Ancillary Program (eg Employment)	Develop Program	Identify Participants	Source Participants	Source Employer	Match Participants & Employer	Manage Rel'ship	Manage Exit of Rel'ship	Evaluation of program & stakeholders
Internal competency	H	L	M	L	M	M	M	M
Financial Administration	Develop Finance Strategy	Create Budget, inc cost centres	Perform against budget	Track against budget	Adjust budget	Achieve Budget	Create & interpret statements	
Internal competency	L	L	M	M	L	L	L	
Marketing & Communications	Develop M & C Strategy	Create materials	Create channels for M & C	Manage M & C	Internal comm's	Evaluate performance		
Internal competency	M	L	L	M	H	L		
Fundraising & Funder Management	Develop Funding Target & Strategy	Identify & develop funder rel'ships	Achieve funding as planned	Success in govt, T & F funding	Retain funders for repeat support	Extend funders new opp	Develop a fee for service stream (?)	
Internal competency	L	M	L	M	M	M	M	
Other	As appropriate for your organisation: - Human Resources - Information Technology - Volunteer Management - Business Development							
Internal competency								

Internal Competency: High (H), Medium (M) or Low (L)

8.5 Successful Partnership Checklist

AIM: to ensure that both parties have openly discussed the partnership vision, commitment and structure and reached a common understanding before finally committing to a partnership.

If any of the answers to the questions below are 'no' further discussion with your partner will be required to proceed.

	Yes	No
Partnership vision: Do both parties agree that		
• they have a shared vision of the social problem they are trying to address		
• they have arrived at suitable objectives for the partnership		
• the partnership model chosen is as beneficial as possible for both parties and the community		
• they have an appreciation and respect for what each party brings to the partnership		
• they have arrived at a common understanding of the meanings of key terms or language used by both parties in the partnership		
Partnership commitment: Are both parties committed to		
• working through any unexpected issues to make the partnership work		
• sticking to the commitments of time and resources to ensure that agreed deadlines are met		
• open and honest lines of communication where they can communicate as equals		
• where necessary being flexible enough to change the nature of the relationship		
Partnership structure: Are both parties clear on		
• how the partnership will operate and each parties roles and responsibilities		
• who the key points of contact are		
• how they will communicate and when		
• how any disputes that arise will be addressed and resolved		
• what benefits and outcomes are going to be measured, how they will be measured and by whom		
• how the partnership will measure and report on whether both parties are sticking to their commitments and the procedure where this is not occurring		
• how they will market the partnership and who will bear the costs		
• who will represent the partnership when speaking to the media and the approval procedure for any media releases or quotes		
• how and when the partnership will be reviewed		
• how the partnership will be renewed or comes to an end. Has a time limit been set or it there a set of circumstances been identified where the partnership will cease?		

Appendices

8.6 Partnership Review Template

AIM: to provide a simple step by step template to complete a review

1. Review Aim	2. Area to Review	3. How to be Measured	4. Results	5. Action Required

8.7 Contributors

Consultation Group participants and Project Contributors:

Kate Boyer	Program Coordinator, Baw Baw Latrobe Local Learning and Employment Network
Karen D’Costa	Corporate Relations Manager, Whitelion
Gina Fiske	Principal Program Manager, Office for Youth, Department of Planning and Community Development
Genevieve Fitzgerald	Community Initiatives Manager, Community Support Fund, Department of Planning and Community Development
Sue Fowler	Executive Officer, Maribyrnong Moonee Valley Local Learning and Employment Network
Sarah Johnson	Program Coordinator, Metropolitan Melbourne Youth Mentoring Implementation & Coordination (MMYMIC) Project
Ene Juurma	Partnerships Manager, The Smith Family
April Livesley-Clarke	Program Coordinator, Grampians Regional Mentoring Network, Lead On Ballarat
Paul Matthewson	Executive Officer, Big Brothers Big Sisters Melbourne
Kelvin McAlpine	Manager Sponsorships & Communications, National Foods Limited
John Prince	Director, Social Compass
Jeanette Pritchard	Program Coordinator, Baimbridge College
Lyn Simmons	Reaching More Kids Coordinator, Berry Street
Cathy Sonnemann	Special Projects, Whitelion
Claire Sonnemann	Project Manager, Whitelion
Mark Watt	Chief Executive Officer, Whitelion
Faye Whitehead	Senior Project Officer, Office for Youth, Department of Planning and Community Development
David White	Chief Executive Officer, Big Brothers Big Sisters Australia
Glenn Willis	Vice Chairman, Australia, Lehman Brothers
Chris Wootton	Grants Executive, Helen Macpherson Smith Trust

Appendices

8.8 Resources

Our Community: Partnership Resource Centre www.ourcommunity.com.au

VicHealth, *The Partnerships Analysis Tool* www.vichealth.vic.gov.au

Youth Mentoring Network www.youthmentoring.org.au

Leading the Way, The Victorian Governments Framework on Mentoring Young People 2005-2008, Department for Victorian Communities, 2005

A Guide to Effective Practice for Mentoring Young People, Department for Victorian Communities, 2006

A Guide to Supporting Effective Programs for Mentoring Young People, Department for Victorian Communities, 2007

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Addis, R and Geddes, S, *Inviting investment in social enterprises - A prospectus framework for the social sector*, RE Ross Trust, 2007

Frearson, A, *Partnership Self-Assessment Toolkit*, East Leeds Primary Care Trust, 2002

Hill, R, *Cross Sector Partnerships in a Crime Prevention Context*, Agora Think Tank, 2007

Loza, J and Prince J, *The practical partnering toolkit*, Social Compass, The Prime Minister's Community Business Partnership, 2007

Tennyson, R, *The partnering toolbook*, International Business Leaders Forum, 2003

Zappala, G, *Corporate Partnerships, 85th Birthday Special Report Series*, The Smith Family, 2007

Further Information

Further information about the Mentoring and Capacity Building Initiative can be found at www.youth.vic.gov.au > Grants & Programs > Mentoring. A great deal of useful information for Victorian young people is available at **www.youthcentral.vic.gov.au**

If you would like to speak to someone about the Mentoring and Capacity Building Initiative, please contact the Office for Youth in the Department of Planning and Community Development by phoning **03 9208 3200**.

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Authorised by James Merlino MP
Minister for Sport, Recreation and Youth Affairs

Designed by The Designery

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