

Business Giving

A joint project by Philanthropy New Zealand and the
Funding Information Service

A Road Map for Development

Thanks to:

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2. Executive Summary

There is wide recognition that Business Giving is under-developed in New Zealand. Various approaches have been taken to co-ordinate, inform and structure Business Giving. While some have had limited success, none have brought together the key elements which address the needs of the business sector to plan, manage and develop their giving programme, and identify charitable projects with which to work.

2.1 Partnership

Philanthropy New Zealand and Funding Information Service have embarked on a joint Business Giving Project to develop competencies and resources that enable and support a culture of Business Giving in New Zealand.

The organisations' natural alliance makes for a robust team with a firm grasp of the funding and resourcing behaviours shown by their common client groups. The partnership will leverage and extend the benefit of the existing knowledge base, services and tools.

2.2 Consultation

This report builds on the knowledge base accumulated by both organisations and key research previously undertaken in this field. A small sample of businesses were selected to guide our thinking in the development of this report and road map.

2.3 Themes

Key themes from this engagement are:

Leadership

Strong leadership is critical to effective giving. The greatest organisational benefits and community impacts are seen when a programme is driven from the top and fed throughout the organisation. How a programme is managed cascades down from this formal structure. Staff engagement in the programme is driven by the leadership statement and, cemented in the performance management measures.

A Focus on Strategic Giving

Organisations are wanting to move from an unplanned Giving Programme to a more strategic approach which supports their bottom line. In most large organisations Giving Programmes are driven at board or top management level and are formally developed by senior management, often including stakeholders and advisors. Giving is firmly linked to strategic goals and Key Performance Indicators (KPIs). Smaller businesses are much less likely to have a

Giving Programme which is linked to strategic goals, or have giving measurement and reporting in place. Their giving is influenced mostly by senior management, with less evidence of strategic engagement of staff.

Who Gives?

Businesses do understand the value of giving, across the broad spectrum of small to large-sized organisations. 'Business can't succeed in societies that fail' is a widely held principle.

Managing a Giving Programme

When it comes to managing a Giving Programme, size does matter. Large organisations are capable of supporting their own programmes and are more likely to manage a complex Giving Programme using a number of giving vehicles.

Formal vs Informal

Larger organisations are likely to have formal giving programmes developed by senior management, and having strong links to the strategic plan. They are also more likely to have defined criteria for giving which link to business purpose, company values and culture.

Smaller organisations are less likely to have a formal giving programme and more likely to give in an ad hoc manner.

Giving Cash

Not many organisations offer cash as part of their giving programme. Having limited funds challenges businesses to be creative and look for alternative means of giving.

Barriers to Giving

Although there is an appetite to give productively and effectively, finding the right model and getting the buy-in are barriers. The relatively youthful nature of Business Giving in New Zealand means planning, setting up and running a programme is not yet a strength shown by many organisations.

Measuring and Benefits

Large corporate organisations are more likely to have the resource and capability to define and measure outputs, outcomes and impacts. They are more likely to be aware of the benefits of investing in their local community as it increases the wellbeing of their customers and stakeholders, and their pool of future employees.

Many organisations are not good at identifying, defining and measuring the benefits of giving. They do not fully understand the benefit of leveraging off giving, or how to do so.

There is tension between organisations wanting information about what others are doing and not wanting to share their own information. Common giving terminology is not used by all organisations in New Zealand. Inconsistency within Government organisations and the market place hampers data capture and limits the value of comparing information.

Services and Tools

Businesses have shown an interest in bespoke solutions that will enable them to target, define and resource their Giving Programme more effectively in order to create greater impact. There is significant support for a ‘one-stop-shop’ approach to giving management, with an expectation that solutions offered would be of superior quality. The type of solutions valued depends on the size of the business and their circumstances.

Access to an ‘Information Hub’ would be valuable to smaller businesses, in particular, who are time and resource poor. Mentoring and advisory services would provide valuable guidance on how to manage a giving programme.

Potential synergies of resource, effort and outcomes are not known to individual organisations. There is a desire for information and opportunities to partner with multiple organisations to remove duplication of effort, in turn creating greater internal and external impact for their investment.

2.4 Conclusions

The following conclusions have been drawn from themes:

- 1 As Business Giving begins to mature in New Zealand organisations show readiness to become more strategic, structured and focused in their approach to giving.
- 2 Gaps in business process exist around:
 - clarification of giving purpose
 - Linking giving activity to strategic plan and KPIs
 - Measurement of inputs, outcomes and impacts, and
 - Reporting.
- 3 Inconsistent Business Giving terminology inhibits the flow of information throughout the marketplace and the value of data captured.
- 4 Giving is often seen as a one way transaction rather than a partnership for mutual benefit and with mutual accountabilities.
- 5 Giving is most often done in a partnership of two. This does not encourage a community-wide approach to addressing social need.

- 6 One size does not fit all. A Business Giving model would need to accommodate the variation in need.

2.5 Outcomes Achieved To Date

Support from the Charities Commission has enabled the following outcomes:

- key stakeholder consultation conducted by Philanthropy NZ and Funding Information Service
- the completion of this report
- development of a Business Giving Road Map, and
- the establishment of a virtual stakeholder group.

2.6 Business Giving Roadmap

A Business Giving Roadmap has been developed as a framework for providing services and tools to enable Business Giving. A phased approach will see development of products and resources that leverage off existing programmes of work.

2.7 Options for Development

A number of opportunities exist that will enable a more effective Business Giving culture in New Zealand. These options will be presented to the DIA Charities, and to other organisations who may wish to partner in the Business Giving project, either as funders or by providing resource.

3. Introduction

An industry knowledge based on Philanthropy New Zealand and the Funding Information Services' 23 years in the business has built an understanding that Business Giving ethos is in its infancy in New Zealand, trailing behind the more sophisticated and purposeful practice seen in other countries. National and international research projects completed over the past few years have confirmed the anecdotal evidence.

The two organisations have embarked on a joint Business Giving Project to develop competencies and resources that enable and support a culture of Business Giving in New Zealand.

The two organisations will use existing business platforms to develop Business Giving:

1. core competencies
2. information and advisory services, and
3. management tools and resources.

4. Purpose

This report is written as the first step in a pathway to achieving the project outcomes. It builds on previous industry research, and combines years of knowledge accumulated by Philanthropy New Zealand and Funding Information Service with findings from key stakeholder consultation. It also informs a Road Map for development. This internal document will form the basis of a Business Giving:

- presentation and report to DIA Charities
- Case for Support for presentation to potential project funders.

5. Background

There is wide recognition that business giving is under-developed in New Zealand. Various approaches have been taken to co-ordinate, inform and structure business giving. While some have had limited success, none have brought together the key elements which address the needs of the business sector to plan and develop their giving programme, and identify charitable projects with which to work.

5.1 The Partnership

Philanthropy New Zealand and the Funding Information Service were both established by Sir Roy McKenzie in 1990, with different but complementary roles in the funding and resourcing sector.

Philanthropy New Zealand specialises in building competencies and best practice among funders. It is well established amongst the philanthropic community, both nationally and internationally.

The Funding Information Service collects, collates and sorts information to assist individuals and charitable organisations to identify funding sources. It collects this information across private, corporate, government, local government, educational and international funding organisations.

The organisations' natural alliance makes for a robust team with a firm grasp of the funding and resourcing behaviours shown by their common client groups. The partnership will leverage off, and extend the benefits, of their existing knowledge base, services and tools.

5.2 Programmes of Work

Both partners have ongoing programmes of development that will provide the platforms from which this project will be launched. Philanthropy New Zealand's Thoughtful Giving Project already provides information and mentoring services to philanthropists. Recent work has also formalised engagement with umbrella organisations to progress Business Giving initiatives.

Since 2006, the Funding Information Service has maintained a product which matches recipients to corporate and business giving. A CorporateCitizens Pilot project starts in September 2013 and will develop a new platform with enhanced capability and functionality to assist with this matching and also offer tools to assist businesses to manage their giving programme.

5.3 Platforms for Development

Thoughtful Giving Website

Philanthropy New Zealand and Creative New Zealand launched the Thoughtful Giving website in 2012. It aims to educate donors to give effectively and create a culture of thoughtful giving in New Zealand. It contains inspiring stories of generosity, outlines the steps to giving and identifies different forms of giving. It has relevancy both for individual philanthropists, and organisations of all shape and size.

Giving Advisory Services

Philanthropy New Zealand currently offers a consultancy service to individuals and businesses wanting assistance with their giving. Backed by over 20 years' experience of philanthropy and giving, they provide expert advice, contacts and a strategic process that allows organisations to develop a giving programme that supports an organisation's values, culture, strategic plan and resources.

CorporateCitizens Database

The Funding Information Service's CorporateCitizens Database holds details of New Zealand businesses that are committed to building relationships with community and voluntary organisations. It provides the best matches between potential partners to allow a strategic approach to relationship building.

5.4 Defining Business Giving

Business Giving is a term used to describe the activities businesses, large and small, carry out to support their communities. It is the giving of money, assets, time, encouragement and expertise by businesses to create positive social and environmental impact. This broad term is used in favour of others as is all encompassing and does not exclude businesses due to size or structure.

Other terms used in the marketplace to describe these activities include:

- Corporate Giving
- Corporate Citizenship
- Corporate Donation Programme
- Corporate Community Investment
- Corporate Community Involvement
- Corporate Social Responsibility, and
- Business Community Engagement.

5.5 Giving Methodologies

Organisations generally offer a Giving Programme (or portfolio), the content of which depends on their organisational values, culture and resources. Most Giving Programmes offer assistance across a number of giving categories. They may be carefully chosen to fit with strategic direction, or chosen in an ad hoc manner to fit immediate need.

The eight giving categories¹ are:

Category	Description
Cause Related Marketing	This refers to a marketing strategy by the company where support of a particular cause or charity is directly referred to in the promotion of a product or service. Typically a company will donate a part of its sale revenue for a given product to a designated charity, in the form of "For every sale of this product we will donate 50 cents to a named charity".
Foundation Grants	Sometimes a company will set up a not-for-profit foundation that might receive annual donations from the company or is given some of its shares. The foundation is then in charge of making grants to the community.
Payroll or Employee Giving	Employees may authorise the company to deduct a donation to charity from their salary each pay period.
Sponsorship	This is where a particular cost or project is paid for by a company in return for some sort of recognition. Sponsorship is very common in sport but frequently used in other parts of the community.
Donations	This term describes a cash donation a company might make to a project or organisation.

¹ Funding Information Service, CorporateCitizens database

Category	Description
Gifts-in-kind / Contra / Pro Bono	These are all terms used to describe discounts to, or a donation of, products or services. Examples include promotional baseball caps for raffles, petrol vouchers, airline tickets, accounting or legal advice.
Scholarships and Education	Some companies have scholarship programmes which they either administer themselves or entrust to an educational institution such as a university. Other types of support to education might include exchange programmes or work placement schemes.
Staff Involvement	Staff involvement can take many forms including employee volunteering, participating in fundraising or sitting on a community organisation's board.

5.6 Previous Research

This report builds on key research previously undertaken in this field². Of particular relevance to this project are the findings of:

- The *Engagement Between Business and Community Organisations* report written by Inspiring Communities
- The report by Business and Economic Research Ltd (BERL) on *Giving New Zealand Philanthropic Funding 2006, and 2011*
- three reports produced by the New Zealand Business Council for Sustainable Development (now Sustainable Business Council, a division of Business NZ) on *The Social Role in Business*, and
- Horizon Research's *Business and Consumer Behaviour 2013* survey.

Engagement Between Business and Community Organisations

DIA Charities and Creative New Zealand supported a research project in 2012 which provided insight into Business Giving in New Zealand amongst small to medium enterprises. The report highlighted key issues which inform this report.

² Refer to Appendices 1: Related Research

These issues include:

- 88% of businesses support community organisations with the driver being ‘it’s the right thing to do’, rather than being a strategic and planned activity
- more businesses would like to develop a donor programme but have little knowledge about how to do this, and
- even those businesses with a donation programme have difficulty finding charitable projects that fit with their donation aims and objectives.³

The report recommended the development of online resources to advise, inform and inspire greater business/community interaction, potentially including online matching based on values and interests.

Giving New Zealand Philanthropic Funding 2006, and 2011

Giving New Zealand Report Philanthropic Funding 2011 was funded by Philanthropy New Zealand. The report, completed by BERL, updates their earlier report completed in 2006. While both reports focus specifically on philanthropy, there are a number of findings which relate to this project.

The reports:

- show that everyday New Zealanders gave generously to their communities, and that New Zealanders’ giving compares favourably with a number of countries
- also uncovered that the way we give is quite different to other countries, such as the major role of our statutory trusts.⁴

The Social Role of Business

The New Zealand Business Council for Sustainable Development has produced a series of three reports addressing the social role of business. This major research project found that business can play a greater role in setting priorities for New Zealand’s social investment spending.

An extract from Report 3: Snapshot 2010 (included below) summarises the business case for engaging in corporate social responsibility.

Nearly 2.4m New Zealanders think more highly of companies that support charities or worthy causes. They are part of a growing global trend that is seeing consumers taking an increasing interest in how companies are behaving socially, environmentally and culturally. These

³ Inspiring Communities, Engagement Between Business and Community Organisations Report

⁴ Giving New Zealand Philanthropic Funding, 2011

“Consumers who Care” form an attractive and challenging marketing proposition as they are bound together by a common behaviour; they will actively support companies that are making a positive difference in society.

These consumers see it as part of a company’s responsibility is to support charities and worthy causes and the returns for the company include loyalty and sales. Key findings include:

- 67% of the population (2.4 million people) agree they think more highly of companies that support charities and other worthy causes
- 54% of the population (1.93 million people) agree they feel more loyal to a company that aligns itself with a charity or worthy cause;
- 50% of the population (1.8 million people) agree that when buying a product or service from a particular company, it is very important to them that the company shows a high level of social and/or environmental responsibility
- 36% of the population (1.29 million people) agree that large companies don’t really care about the long term social and environmental impact of their actions
- 51% of the population (1.83 million people) agree they would like companies to tell them more about how they are making a positive difference to society or the environment so they can support them
- 53% of the population (1.9 million people) agree that buying products from a company that supports a charity or worthy cause helps them to feel they are making a difference to society or the environment
- 33% of the population (1.2 million people) agree they would like companies to support charities or worthy causes because they personally don’t have the time or resources to do it.⁵

Business and Consumer Behaviour 2013

The Horizon Research report of May 2013 prepared for the Sustainable Business Council confirms the deep connection New Zealanders have to their natural environment and the way they relate that to business behaviour and policy. The survey found that more organisations are focusing on profit first, rather than profit and balancing the needs of the community. However, there are significant opportunities for organisations to use environmental and social factors to compete for customers and sales.

The following findings provide useful insight for this report:

- 71% of organisations have community or social activity involvement.

⁵ NZBCSD, The Social Role in Business – Part 3 Guide for Business

- 33% of organisations do not measure their community involvement.
- New Zealand-owned organisations contributing financially to charities and community organisations had decreased to 7% from the previous year, to 41%.
- Non-New Zealand owned organisations contributing financially to charities and community organisations had dropped dramatically from 68% in 2011, to 48% in 2013.
- Attention to staff turnover and training has fallen from 43.6% in 2009 to 34.8% in 2013.
- 39% of respondents said they would leave an organisation whose corporate responsibility behaviour no longer met their expectations, down from 41% in 2012 and 56% in 2011.
- While 33% of organisations had strategic partnerships with government organisations and 36% with community organisations, strategic partnerships are declining 1.3% per annum on average.⁶

⁶ Horizon Research, Business and Consumer Behaviour 2013

6. Consultation and Engagement Methodology

Philanthropy New Zealand and Funding Information Service have built a significant knowledge base over their 23 years in the sector. Additional consultation was conducted to build on this knowledge to capture the motivations, behaviours and attitude to Business Giving of a small sample of businesses. Answers were sought to the following key questions in relation to Business Giving:

- what is happening
- how are decisions are made and why,
- what is the appetite for effective giving, and
- what businesses need to grow Business Giving.

7. Themes

The themes below are a summary of industry knowledge held by both partners, and the additional consultation completed for this project.

7.1 Strong Leadership

Strong leadership is critical to effective giving. The greatest organisational benefits and community impacts are seen when a programme is driven from the top and fed throughout the organisation. How a programme is managed cascades down from this formal structure. Staff engagement in the programme is driven by the leadership statement and, cemented in the performance management measures.

Staff engagement is critical to the success of large giving programmes and, while a programme will be framed at a strategic level, management seek and consider the opinion of their staff when deciding on how to give and whom to give to. This approach benefits morale and offers opportunities for team building.

7.2 A Focus on Strategic Giving

Some organisations are wanting to move from an unplanned Giving Programme to a more strategic approach which supports their bottom line. In most large organisations Giving Programmes are driven at board or top management level and are formally developed by senior management, often including stakeholders and advisors. Giving is firmly linked to strategic goals and Key Performance Indicators (KPIs).

Smaller businesses are much less likely to have a Giving Programme which is linked to strategic goals, or have giving measurement and reporting in place. Their giving is influenced mostly by senior management, with less evidence of strategic engagement of staff. They will, however, respond to staff interests and requests when making decisions about where and how to give resources.

Some organisations mentioned switching their approach to a more skilled volunteering model i.e. providing professional services rather than unskilled labour, and a focus on up-skilling the recipient organisation in order for them to be sustainable in the future. A 'hand up, not a handout' is important as Business Giving matures in New Zealand.

There is a desire for Non-Government Organisations (NGO) to tell their story, and frame a partnership rather than just request assistance. This benefits both parties by helping them to

understand the value each can offer the other e.g. an organisation may support a ballet company so they can take clients to ballet performances.

Contributing to their own employee's wellbeing features highly for many employers e.g. one employer offered, among other things, a financial literacy programme.

7.3 Who Gives?

Businesses do understand the value of giving, across the broad spectrum of small to large-sized organisations. All organisations consulted thought it was very important to give back to the community that supports them. There is varying recognition that this may, in turn strengthen their workforce and community. 'Business can't succeed in societies that fail' is a widely held principle amongst organisations that have thought more deeply about their business giving programme.

Giving is not always driven by philanthropy. There is a perception by some that they must be seen to be doing something in their community, especially when measured against their competitors' efforts.

7.4 Managing a Giving Programme

When it comes to managing a Giving Programme, size does matter. Large organisations are capable of supporting their own programmes. Larger organisations are more likely to manage a complex Giving Programme using a number of giving vehicles.

Some small businesses feel overwhelmed by the volume of requests for assistance that come from many channels. Managing these requests with any sense of control is difficult for organisations that have no time or effective methods of managing these requests.

People, from large and small organisations alike, find it hard to say 'no'. They feel more comfortable doing so when they are able to make a referral to another source of funding e.g. "try the CorporateCitizen Tools".

7.5 Formal vs Informal

Larger organisations are likely to have formal giving programmes developed by senior management, and having strong links to the strategic plan. Larger organisations are more likely to have defined criteria for giving which link to business purpose, company values and culture.

Smaller organisations are less likely to have a formal giving programme and more likely to give in an ad hoc manner, to those who ask at the right time (the right time being when they have time or resource to commit).

7.6 Giving Cash

While many organisations offer small amounts of cash as part of their giving programme, large cash donations are offered by very few. Those who do are usually large corporations who offer sponsorships to high profile sports teams or similar, in return for exposure and marketing opportunities. These contracts have obvious and well-defined business benefits for both parties and are more accurately defined as sponsorships.

Having limited funds challenges businesses to be creative and look for alternative means of giving.

7.7 Barriers to Giving

Some organisations feel increasingly under pressure by direct approaches for assistance and are wary of being open about their giving incase this encourages a greater influx of requests.

Although there is an appetite to give productively and effectively, finding the right model and getting the buy-in are barriers. The relatively youthful nature of Business Giving in New Zealand means planning, setting up and running a programme is not yet a strength shown by many organisations.

7.8 Measuring and Benefits

Large corporate organisations are more likely have the resource and capability to define and measure outputs, outcomes and impacts. Some have access to sophisticated measuring tools developed by international corporate offices. They are also more likely to have some expectation of return benefits for giving.

Large organisations are often very aware of the benefits of investing in their local community and see it increases the wellbeing of their customers and stakeholders, and their pool of future employees. However, this understanding may be more 'gut feeling' than something that is measured and quantified.

Some organisations test their Giving Programme as part of their staff engagement programme and tie their senior management teams KPIs to these outcomes.

Many organisations are not good at identifying, defining and measuring the benefits of giving. They do not fully understand the benefit of leveraging off giving, or how to do so. For some, these are not the drivers underpinning their giving.

There is tension between organanisations wanting information about what others are doing and not wanting to share their own information. Businesses are largely private about what

they do as they don't want to be seen to be bragging, or are wary of attracting too many requests for assistance. This stifles opportunities to leverage off giving activities by talking about successes and sharing stories with the wider business community.

Transparency of resource use was particularly important to smaller businesses that have fewer resources to give. They want to know exactly how their hard earned resources will be used.

Common giving terminology is not used by all organisations in New Zealand. Inconsistency within Government organisations and the market place hampers data capture and limits the value of comparing information.

7.9 Services and Tools

Businesses have shown interest in bespoke solutions that will enable them to target, define and resource their Giving Programme more effectively in order to create greater impact. There is significant support for a 'one-stop-shop' approach to giving management, with an expectation that solutions offered would be of superior quality. The type of solutions valued depends on the size of the business and their circumstances. Technology, mentoring, networking, strategic advice and matching were among the services cited as being practical and beneficial.

Access to an 'Information Hub' would be valuable to smaller businesses, in particular, who are time and resource poor. Mentoring and advisory services would provide valuable guidance on how to manage a giving programme.

Many large companies might have developed their own measuring tools. However, smaller businesses are less likely to have the resource to develop their own Giving Programmes and see the value in easy-to-use measurement tools. They are also open to technological support.

Business Giving benchmarking information is not currently available in New Zealand and would provide a valuable resource, particularly for larger organisations with sophisticated measuring and reporting mechanisms.

Smaller businesses show interest in matching tools. However, there is some concern that it would set expectations of NGO's too high and encourage an influx of unwanted requests for assistance. Businesses would benefit from a service which managed applications in a 'clearing house' style.

In a business giving relationship, the majority of businesses partner with one NGO to create a specific outcome. This is partly because businesses do not have a view of the whole landscape of social need. Potential synergies of resource, effort and outcomes are not known to individual organisations. There is a desire for information and opportunities to partner with multiple organisations to remove duplication of effort, in turn creating greater internal and external impact for their investment.

9. Outcomes Achieved To Date

The Business Giving project has been kick-started with support from DIA Charities. These funds have enabled:

- key stakeholder consultation conducted by Philanthropy NZ and Funding Information Service
- development of a Business Giving Road Map
- the completion of this report, and
- the establishment of a virtual stakeholder group.

10. Opportunities For Development

A phased approach to development identifies a number of opportunities that will enable a more effective Business Giving culture in New Zealand.

This paper proposes the development of road map for encouraging and enabling good practice in business giving across the corporate, business, government and NGO sectors.

10.1 Phase 1

To be most effective, each partner will work to the strength by leading those joint projects which reflect the competencies of their organisation. Responsibility for components of potential development is identified below:

Lead Partner	Options for development	Expansion and Development
Philanthropy New Zealand	<ul style="list-style-type: none"> • Create an online information hub of resources and case studies to support and inspire business and communities. • Create mentor, advisory and information services. • Provide competencies against which to measure giving outcomes and impacts. • Facilitate partnerships. 	<p>Information Hub</p> <ul style="list-style-type: none"> • Industry knowledge • Case Studies • Networks • Links to market research • Mentoring
Funding Information Service	<ul style="list-style-type: none"> • Facilitate collaboration for community-wide issues and projects. • Provide technology for profiling, matching and managing a giving programme. • Provide tools for planning, measuring, reporting, and portfolio management • Establish an information collection and research development programme 	<p>Prequalification</p> <ul style="list-style-type: none"> • Applicant and donor profiles • Application facilitation • Volume and quality control • Elimination of application duplication • Gather data on business giving activity in NZ

10.2 Opportunities for DIA Charities

DIA Charities Open Data application, and the Charities Register provide opportunities for collaboration on a number of project activities:

- build a collaborative government environment for Business Giving
- feed standardised Business Giving terminology and categories to other government agencies
- form a research partnership with Philanthropy New Zealand and the Funding Information Service to complete annual/biannual research, and
- fund the design and implementation of the road map

11. Business Giving Road Map

The Business Giving Road Map facilitates business and NGO partnerships, and community-wide collaboration, for mutual benefit. It accommodates the continuum of business size, from small to large organisations, and the variety of giving methodologies and capabilities they display.

11.1 Elements

The Business Giving Road Map has five elements that complete the process of giving. Each element forms a question which must be addressed by each organisation developing a giving programme: Why, What, How, Who and Return on Investment.

11.2 Functions

The five functions group services or tools into types of assistance: Advisory, Vehicles, Management, Matching and Reporting.

11.3 Activities

The type of assistance an organisation requires will be determined by organisational culture and access to resources. The services and tools accessed by each organisation will be as many or as few as they need to address their individual need.

Advisory Services

Consultancy services will be available to individuals and organisation wanting information, guidance, advice or mentoring to develop their giving programme.

On-Line Self-Managed Tools

Members manage their own profile and requirements using online database and tools. The database provides a search facility matching values, needs and outcomes of those offering and seeking resources. Members can close their profile if their giving portfolio is full and they do not wish to receive requests at present.

Members consider options and enter into discussion with potential partners. Partnership agreements are negotiated based on mutual goals and outcomes, and include link to strategic goals, and reporting requirements. Both partners are accountable for outcomes, and review and renegotiate terms for a continuing partnership, or agreement to cease the partnership.

The process includes identification of outcomes and impacts, and how these will be quantified and measured.

Members manage their own Giving Portfolio which may include:

- one or a number of partnerships
- a collaboration between many partners
- a partnership with a number of projects, and/or
- a partnership which includes a range of giving methods (e.g. cash, facility use, professional services).

Facilitating Collaboration

Community-wide collaboration is facilitated to identify potential economies of scale, duplication of effort and opportunities to share resources. Partnerships can be between two or more businesses, and two or more NGOs.

Element	Function	Activity
Why	Advisory	<ul style="list-style-type: none"> • Access giving case studies, industry knowledge and networks • Access data and value-added information • Access advisory and mentoring services
What	Vehicles	<ul style="list-style-type: none"> • Identify giving vehicles that match organisational values, culture and strategic goals • Manage multiple giving vehicles
How	Management	<ul style="list-style-type: none"> • Identify values, strategic goals, projects, social interest • Identify resources and benefits to offer • Manage multiple partnerships • Manage member profiles(both business and charity)
Who	Matching	<ul style="list-style-type: none"> • Match values, need and resource • Collaborate with multiple partners on one project • Agree mutual benefit and commitment
Return on Investment	Reporting	<ul style="list-style-type: none"> • Define and quantify contribution, benefits and rewards • Link to partners strategic plans • Capture data (quantitative and/or qualitative) • Define reporting requirements • Report partnership outcomes • Review partnership outcomes

12. Next Steps

The next steps in the Business Giving project are:

1. Report findings to DIA Charities
2. Develop a Business Giving Business Case which includes a Business Giving Model
3. Seek resources and funding for Business Giving Project Phase 1.

13. Conclusions

The following conclusions have been drawn from this consultation:

- 1 As Business Giving begins to mature in New Zealand organisations show readiness to become more strategic, structured and focused in their approach to giving.
- 2 The businesses we have engaged with through this project would utilise planning and management tools to better strategise, measure and deliver a business giving programme.
- 3 Philanthropy NZ and the Funding Information Service develop and deliver a business giving road map which enables business and NGO partnerships –
 - Advisory
 - Vehicles
 - Matching Tools
 - Management Tools
 - Impact Reporting
- 4 The business giving sector needs steady investment over time, in these tools to enable and grow the impact of business giving.

13. Appendices

13.1 Related Research

Previous research contributes valuable context, data and findings which have contributed to the Business Giving partners understanding and knowledge of the Business Giving environment.

Information	Produced By	Link
<i>Engagement Between Business and Community Organisations</i>	DIA Charities and Creative New Zealand	www.charities.govt.nz/assets/docs/reports/EngagementCommunityBusinessFull.pdf
<i>Giving New Zealand Philanthropic Funding 2011</i>	BERL	www.giving.org.nz/research-and-publications
<i>The Social Role of Business, Parts 1-3</i>	Sustainable Business Council	www.sbc.org.nz/resources-and-tools/reports/reports/social-role-of-business www.sbc.org.nz/data/assets/pdf_file/0006/56526/Part-2-Snapshot-of-business-social-involvement.pdf www.sbc.org.nz/data/assets/pdf_file/0007/56527/Part-3-Guide-for-business-on-social-engagement.pdf
<i>Business and Consumer Behaviour 2013</i>	Horizon Research	www.sbc.org.nz/data/assets/pdf_file/0007/66868/Horizon-Research-Survey-on-Business-and-Consumer-Behaviour-2013.pdf
<i>Better Business Better World</i> report Data on consumer choices for development and	Colmar Brunton	www.colmarbrunton.co.nz/index.php/polls-and-surveys/better-business-better-world/better-business-better-world-report

Information	Produced By	Link
measurement of CCI policies		
Various publications focused on environmental impacts –	Sustainable Business Network	www.sustainable.org.nz/publications
Includes Panorama data on consumer choices for development and measurement of CCI policies	Neilson Research	www.nielsenmedia.co.nz/product.asp?productID=18
<i>The State of CSR in NZ and Australia</i>	Australian Centre for CSR	www.wrightcommunications.co.nz/media/22367/state%20of%20csr%20in%20australia%20and%20nz%202013.pdf
<i>Business and the Community NZ Report 2012</i>	Business and Community Shares NZ	www.bacshares.org.nz/2012/07/lonon-benchmarking-group-report-on-survey-business-and-community-nz/
<i>Corporate Social Responsibility - Current Trends</i>	Manpower	www.manpower.co.nz/Documents/White-Papers/2009_CSR%20White%20Paper.pdf
<i>Corporate Social Responsibility 2012</i>	Volunteering New Zealand	www.volunteeringnz.org.nz/wp-content/uploads/2012/10/2012-05-Corporate-Social-Responsibility-Report-FINAL-printed-for-VCs.pdf

