

Partnership of Equals

Insights Report into business-community-charity engagement



Research sponsored by



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Foreword

A Community Company

At Carillion, we often explain that we are “a Community Company”. The thousands of locations our people are helping to build, service and support across the UK and our international operations, mean that we work and live in those communities. Without a deep, long-term commitment to understand – and ideally help to meet – the needs of the people who make them up, we cannot be effective or trusted.

Effective, trusted partnerships between two parties usually involve three things – the two parties themselves and the experience that is created by the partnership they share. The three sides of that triangle are most balanced when the two parties bring equal influence, recognising the wealth of value in each of their individual identities. Suggestions of dependency – with some kind of unfair expectation that either side can solve the shortcomings of the other – may consign that partnership to failure and will lead to unfulfilled expectations at the very least.

Across our operations, 99% of our projects and contracts have a Community Needs Plan, and our people have created a rich seam of warm, inspiring, effective stories of community engagement. We tend to focus on education and young people, employment support for disadvantaged groups and ways to promote local economic growth – all issues at the core of our business. However, we know that there are still gaps in effectiveness, and we know that society continues to change around us – offering new opportunities, but bringing risks as well.

Our new charity partnership with Hospice UK was chosen – quite significantly – from the wealth of opportunity that we saw on each side to give and gain. The chance for skills-based volunteering, linked to regional impacts and benefits that our people could



Richard Howson



David Picton

do, see and feel proud of, was a key consideration in setting up the partnership. Agreement of expectations on either side, clear communications and a regional network of people taking personal responsibility for practical networking were essential ingredients to set up a balanced diet of volunteering and joint learning.

We think that our 14-year partnership with Business in the Community is a successful example of closing the gap between business and some of society’s most vulnerable groups. Highly structured programmes, backed by clear guidance and training, offering measurable outcomes help to focus our investment of time and cash to help as many people as possible. In return, our own people take a sense of pride, personal development, challenge, new skills and a huge sense of satisfaction from changing the lives of others.

We hope you find something in this report and in the analysis to help you create better Partnerships of Equals. The phrase that jumped out most strongly during the research was that of ‘unpacking the notion of charity’. With echoes of ‘alms for the poor’ perhaps it is time to recognise very clearly that charities and community groups can significantly contribute to businesses, and they – in turn – can offer so much more than simply cash donations. Closing the mismatch of expectations, speaking one language, focusing on skills-based volunteering and properly understanding each party’s needs and wants are clear steps on the journey to a Partnership of Equals. We hope you feel inspired to act on the outcomes, whichever side of that partnership you live on.

Richard Howson, Chief Executive

David Picton, Chief Sustainability Officer

Executive summary

This Insights Report is the culmination of six months of detailed stakeholder research, conducted on behalf of Carillion during the autumn of 2015 and spring of 2016. The research set out to discover how the relationship between businesses and local communities – represented by community groups and charities – can be improved to deliver benefit on both sides of that relationship.

The research involved an online survey of 248 people from community groups, charities, businesses local and central government; data and opinions from more than 100 hours of interviews and facilitated face-to-face conversations. This material has been brought together and shaped this Insights Report.

The outcome is a series of insights into the relationships which businesses, charities and community groups have. There was clear evidence that a gap exists between the two sides in terms of needs and wants, expectations and aspirations. Alongside this however, there was a realisation within the research that local communities and charities have a tremendous amount which they can contribute to businesses and which businesses could benefit and learn from.

Participants generally acknowledged that businesses do a good job in supporting local communities and charities. However, probably the most significant finding of all is that; although the vast majority of the participants acknowledged the existence of the gap in understanding and empathy between businesses and communities no-one has yet solved the problem entirely.

There is evidence that efforts are already being made around the country, using a variety of networking events, community co-ordinators and match-making initiatives (either through organised events or via individuals dedicated to bringing partners together). However all the stakeholders agree that it can be highly fragmented, occasionally unstructured and an opportunity exists to dramatically improve relationships between businesses and communities.

Potential solutions were proposed and developed during the roundtable events. These were scrutinised and tested, within the time available by experienced professionals from large corporates, SMEs, local community groups and national charities, as part of the research. The ideas – which are described in the last section of this Insights Report – were met with enthusiasm and support.

It emerged that there is a real need for improved communications, between the parties and within organisations themselves. Proposals for eliminating the gap in understanding between businesses and community groups, and improving partnering to deliver positive outcomes, include; local networking, the development of a nationally-based but regionally-represented brokerage service and better signposting of the large amount of excellent information that already exists.

The findings of this Report, if developed and implemented intelligently, could bring a significant and lasting improvement to the way in which businesses and community groups or charities come together in the future to create a Partnership of Equals which bring lasting benefits to both sides.

Introduction

During the autumn of 2015, Carillion commissioned a comprehensive independent research project to investigate the relationship between communities and businesses, building upon its existing engagement with community groups and charities.

The objective was to discover more about the ways in which local community groups, regional and national charities interact with businesses; and to see whether there was more that could be done to improve any engagement models that currently exist.

Research objective

Online surveys, in-depth interviews and two roundtable events uncovered significant findings across the topic area. The results of this three-part engagement are delivered in detail in this **Insight Report**. The objective of this report is to provide anyone who is involved in starting, developing or enhancing relationships between communities and businesses with practical suggestions and guidance, as well as reporting the data outcomes from the research itself.

By raising awareness of the problems and opportunities that so clearly exist, Carillion hopes that both business and third sector representatives will be able to develop the ideas provided in these pages.

Carillion is an integrated support services business which operates in the UK, Canada and MENA. Carillion's operations bring it close to many diverse communities, which it endeavours to become part of and support in a number of ways. The company has seen significant positive impacts from its community activities, but also recognised that political and societal changes influence how businesses and local communities interact, Carillion was keen to understand more about how both sides viewed existing relationships and how these could be improved and adapted to meet changing circumstances.

Setting the scene

The current model in context.

Business – Community – Charity Collaboration

There are two parties in any partnership. In this case there is business on one side and a charity or community group on the other. The classic model recognised by most is that the business gives and the charity or community group receives. Historically this giving has been predominantly a financial transaction, but more recently there has been a growing awareness of the importance and value of in-kind

support, services or skills. Traditional business/charity relationships have been based (literally) on give-and-take.

Although the landscape has changed significantly in the past few years, there was clear evidence from Carillion's own experience that the benefits available to both partners were not being maximised.

248 completed surveys

8 detailed stakeholder interviews

2 regional roundtable events

How the research was undertaken

Carillion commissioned sustainability engagement specialists IMS Consulting (Europe) Ltd to undertake a research project between September 2015 and April 2016 to assess community group, charity and businesses views on:

- the effectiveness of current business-community/charity engagement partnerships
- what needs and aspirations stakeholders have for working together
- what good looks like in terms of community engagement partnerships
- what good looks like in terms of charity partnerships
- where improvements can be made to the identification, setting up and running of partnerships
- what resources stakeholders need to make partnerships and community projects successful

The research was split into three stages:

1. An online **survey, completed by 248 people** representing community groups, charities, businesses, government contacts and non-government organisations working in this space. Quantitative and qualitative data was captured and

analysed to gain an overview of the key themes and issues, using input direct from UK organisations working on business-community/charity partnership projects in local communities.

2. **Telephone interviews with 8 key stakeholders;** representing businesses, charities and local community groups. The purpose of this stage was to check and expand upon the key themes emerging from the survey and understand in more detail some of the individual challenges and opportunities stakeholders see in their own community engagement partnerships.
3. **Two roundtable events,** held in London and Manchester, with representatives from businesses, charities and community groups. The roundtables presented the findings of the first two stages of research and facilitated roundtable discussions on the tools and resources needed to solve some of the problems identified.

An overview of the research findings are presented in the subsequent sections of this report.

Research highlights

Have you worked on business/community projects?

82% have

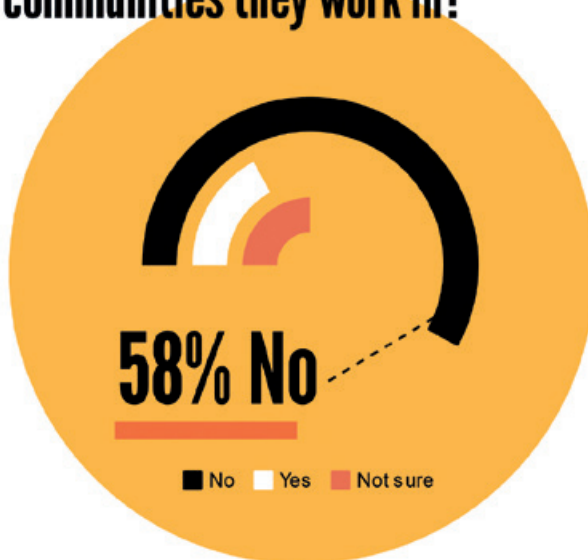


55% of businesses said it was a positive experience



53% of charities and community groups said it was a mixed experience

Do businesses contribute enough in the communities they work in?



Working with communities on local projects and initiatives makes a business more successful

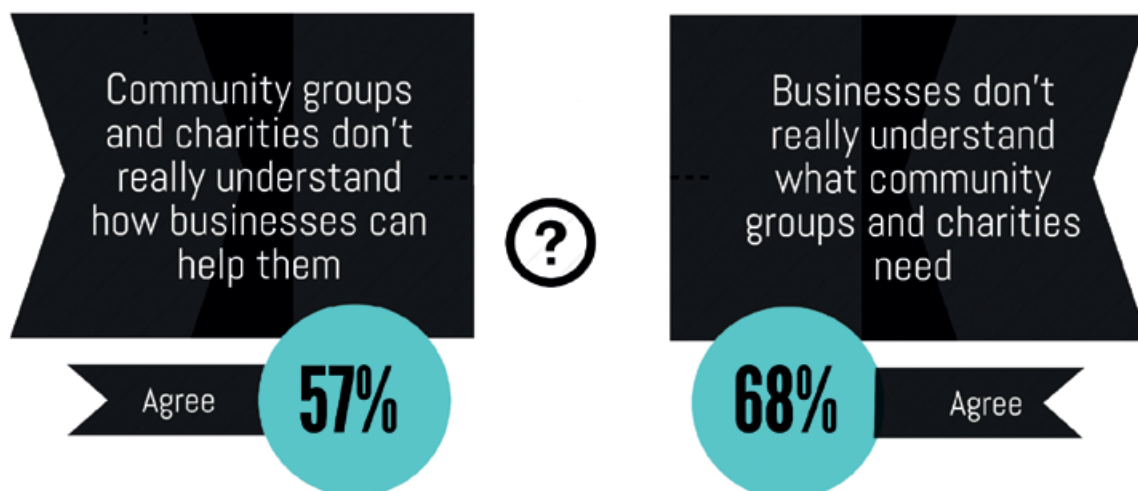
75% agree

91% agree

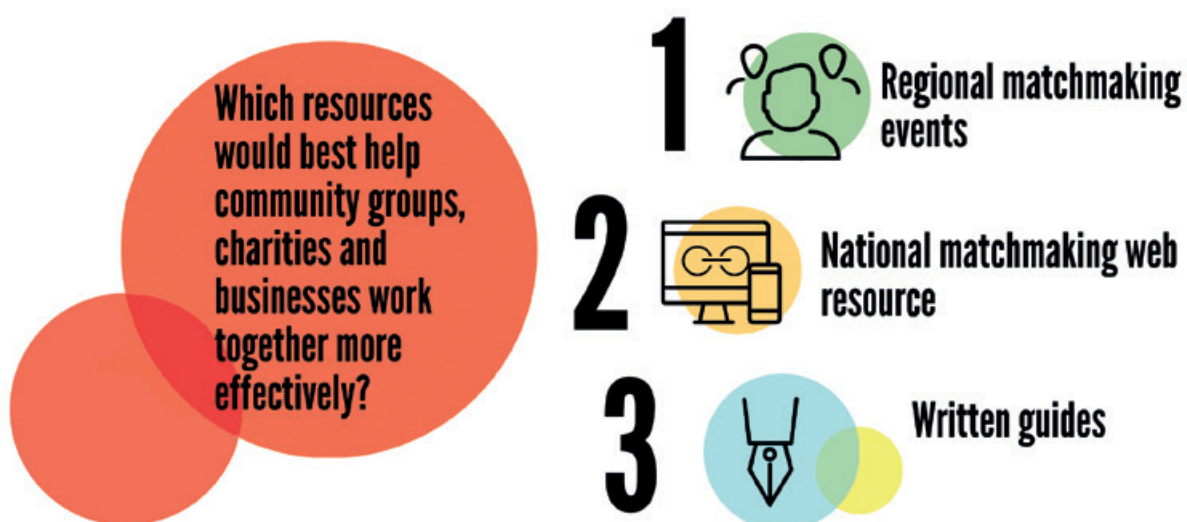
Working with communities can benefit both the employees of the business and the community volunteers in developing new skills and experience

Research highlights

Mismatch



Do you feel skills based volunteering could help your organisation?



Existing mismatch hampers success

Businesses and community groups regularly work together but both sides can feel slightly disappointed by the experience. The mismatch springs from a lack of understanding of needs and wants on both sides. Businesses aren't always sure what community groups want and community groups don't always understand how best to harness the skills and experience of the people working in businesses.

The results of the online engagement identified a clear divide between what businesses thought they were contributing to a partnership, and what charities or community groups were receiving. Over three-quarters of the respondents agreed that working with communities on local projects and initiatives makes a business more successful.

However, in spite of these positive responses, the extent of the mismatch between needs and wants becomes very apparent when comparing the response to a question: was the experience a good one? Over half the businesses responding agreed it was, while over half the charities disagreed, saying it was a mixed or negative experience. **Fifty-eight percent** of all respondents said businesses don't contribute enough to the communities they work in.

Further investigation of the issue, by way of detailed interviews with eight stakeholders and the output from the two Roundtable events confirmed the survey findings. Charities, communities and businesses have an idea of what they expect from the collaboration and the benefits that they could gain. However, the analysis shows that there is an obvious gap between what businesses, charities and community groups think about the benefits of their partnerships. There is a **big mismatch of expectations**.

The views of businesses

- Some charities don't understand how businesses operate
- Many charities simply want financial contributions or sponsorship
- Non-financial partnerships with charities and community groups can be open-ended, pulling the business into making commitments it didn't originally envisage

The views of charities and community groups

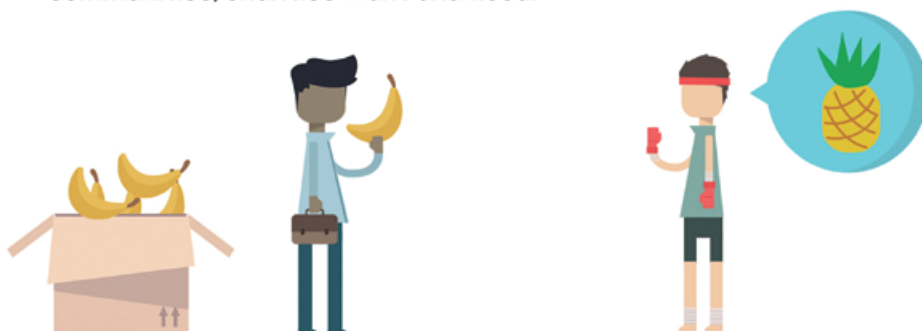
- Businesses tend to offer money, but lack real involvement in projects
- Businesses see the relationship as one-way. They give, the charity takes
- Businesses don't understand, or acknowledge that charities and community groups can provide skills, knowledge and services back to the business
- Businesses tend to favour supporting larger, high-profile, charities
- Collaboration is sometimes simply a "box-ticking" exercise

78%

of community groups and charities agree there is a mismatch between what businesses offer to local communities in terms of support, and what they actually need.

Mismatch

There is a mismatch between what businesses offer and what communities/charities want and need.



This often leads to a business thinking that a collaborative project has been successful, whilst the community/charity thinks the project has been problematic.

Key research takeout

One partnership - speaking different languages

Both parties expressed their feelings and concerns about speaking a “different language”, which causes misunderstanding and unfulfilled expectations. Businesses and charities have a different way of operating and both parties claim that sometimes communication can be difficult. It’s perceived that charities don’t know how businesses operate and businesses do not always respect charities and treat them as equals.

Many stakeholders believe that if businesses are emotionally involved in a specific project, because the cause is close to their heart, it promotes better engagement from both parties, which will translate into a successful relationship/collaboration.

“It needs to make emotional sense” Lynn Sbaih, Give2Gain Timebank Stockport

“ We are divided by language. We need to develop a common language that we can all understand. ”

Julie Farrow Hunts Forum (Charity)

Existing mismatch hampers success: Conclusion

The mismatching/misunderstanding between businesses on the one hand, and charities and community groups on the other, is a key theme in this analysis. It has been prominent in the online survey, the interviews and the Roundtable discussions. All parties agree that the mismatch exists. There is a gap between what each party expects from the other and what they actually receive. This often

hinders the development of long-term and successful relationships.

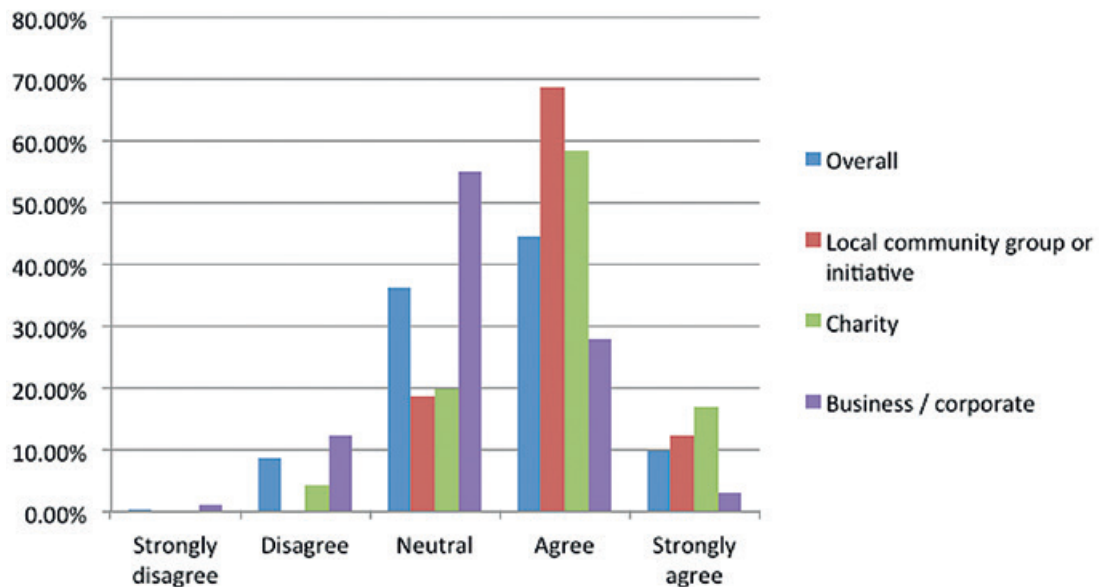
Although the problem has already been identified by many of the stakeholders who took part in the research, the challenge lies in improving communications and understanding.

Survey data evidence

31%

of businesses agree that there is a mismatch between what businesses offer to local communities in terms of support, and what they actually need

Do you agree or disagree with the following statement: **'There is a mismatch between what businesses offer to local communities in terms of support, and what they actually need'**



Business

"We want to support our local community."
 "We believe in charitable giving."
 "Our staff are enthusiastic about raising money for charity."

"We are proud to give all our employees volunteering days."

"Can we come and paint your social centre?"

"Are we working with a charity that matches our own values?"

"We're not really seeing the value we'd expected from the relationship."

Community Group

"Volunteering is great, but there is also a cost associated with that for us."

"What we really need is some of your time to help us with our business plan."

"We looked for actual involvement to improve their ROI but they weren't interested."

"Giving time is what we really appreciate and it makes a significant difference."

"Some businesses do not necessarily find it easy to grasp our community-focused purpose; this can lead to different priorities which unless openly discussed, can lead to challenges and frustration."

CASE STUDY: Misalignment

One national charity experienced a relationship with a sponsoring company that faltered and failed. The company didn't understand that the charity could give as well as take, and that financial support was not the be-all and end-all of a good partnership. As a result of the mismatch, the relationship broke down completely.



CASE STUDY: Breaking down barriers to employment

Carillion have been one of the UK's lead partners for Business in the Community's (BiTC) Ready for Work national employment programme for 8 years. Employees train and volunteer as mentors and job coaches, supporting candidates from disadvantaged groups (including ex-offenders, those at risk of homelessness and ex-service personnel) through work placements, interviews and ideally into permanent jobs. In 2015, Carillion helped their 400th person into employment, and have offered over 1000 placements over the last eight years.

"I thought I would never get a job. I was applying for hundreds of opportunities and my confidence was destroyed. I wasn't sure what to expect from the course because I'd never worked on a building site, but the structure helped me get back on my feet. Everyone was so friendly and constantly looking out for me. Now, I can honestly say it's one of the most enjoyable jobs I've ever had. I feel like I've just left school and I'm starting all over again."

Steve, 400th Ready for Work client

"Volunteering as a Job Coach has been a different experience each time, and taught me more than I ever expected. The biggest lesson for me was how important work is in people's lives, not just to earn money but to feel like you have value."

Sally Harrison, Business Development Manager



Effective collaboration benefits both parties

A number of barriers to effective collaboration were identified during the research, particularly as a result of the Roundtables and telephone interviews. It became apparent during these dialogues that although both parties really want the relationship to succeed, there were some important gaps in each side's understanding of the other's operating procedures.

The research found that most larger charities employ senior staff who have direct experience in working for large corporates. In fact, large charities are likely to have more knowledge of the workings of big business than vice versa. It was also clear that smaller charities and community groups frequently don't appreciate the way businesses operate, such as scheduling, commercial agreements and delivery commitments

Large charities are completely familiar with media and marketing. They understand how to pitch an opportunity to potential business partners in a compelling way, whereas smaller charities often need guidance in basic business skills, both to help them communicate with companies and also to aid in improving their own communications.

There is a widening gap between small local charities and large national charities, in terms of their ability to; attract and retain business support, differentiate themselves in an increasingly competitive market, access to contacts in potential sponsor businesses and understand what a business wants from a relationship. Access to trained professional fund-raisers, marketing staff and business relationship personnel is also frequently an issue for smaller community organisations.

The flip side is that businesses often don't appreciate the value that engaging with a charity can bring. These benefits include; improved knowledge of the opportunities and challenges within a local community,

better understanding of the local workforce, and access to specialist skills, particularly relating to personnel and HR issues, physical and mental health and wellbeing.

It appears that businesses can often treat charities and community groups as minority partners, believing that they have little to offer in return for the business's support.

The research highlighted that although financial donations are important to charities and community groups, provision of skills-based volunteering is viewed as one of the most valuable aspects of charitable giving.

Businesses and charities/community groups have similar ideas of what they would like to achieve from collaborating with each other and how they could all benefit. All agree that there are **mutual benefits** in collaborating with another organisation. Businesses are able to improve their reputation (the most mentioned benefit claimed by businesses during the research), which potentially leads to opportunities such as more work locally.

91%

of respondents agree or strongly agree that working with communities can benefit both the employees of the business and the community volunteers in developing new skills and experience

Effective collaboration benefits both sides equally

When done well collaboration can provide skills, development and financial benefit for both community groups/charities and businesses.



Key research takeout

Skills-based volunteering by business

When asked what are the most important things businesses can help community groups and charities with, ‘financial donations’ was the top choice. However, a very close second place, almost tied was ‘providing training and job opportunities for under-employed groups’. Third place was ‘providing labour and physical skills’ and fourth place ‘support in the development of business plans for charities and community organisations’

“ One of the best contributions would be through offering board membership matching and training opportunities. ”

Barbara Harbinson
Halifax Opportunities Trust

Many businesses are very well-placed to provide the specialist support and skills that charities and community groups are short of. Whether it is volunteering to help build a business plan, assistance with recruiting, guidance on finance or helping to train community group volunteers in communicating, marketing or public speaking, businesses are often

a rich source of talent that can be loaned out to receptive local groups. However, some charities found it challenging to identify how they could be clear about the skills they needed from business, and others found they could be overwhelmed by ‘peak’ offers of volunteering, preferring to have a regular ‘drip-feed’ over a longer, more consistent timeframe.

The hidden knowledge of community groups

Charities also feel that they can usually offer a lot more to businesses. In particular, they can offer support and guidance for people in fields such as mental and physical wellbeing, disabilities training, stress management, dealing with bereavement and specialist consultancy advice on the needs and wants of local communities.

Some very small and highly focused community groups have realised the value and potential of their knowledge of a locality or a special subject, and have begun to partner with businesses who can benefit from this information.



Effective collaboration benefits both parties: Conclusion

It is clear from the research that parties on either sides of the relationship can probably benefit more than they realised from working with each other - certainly all showed willingness to collaborate. Businesses are keen to help charities more than just by providing financial support, however finding the right fit for the skills that the business has available is often more difficult than simply donating money.

This is something that charities recognised too, they had experiences where they have been chosen

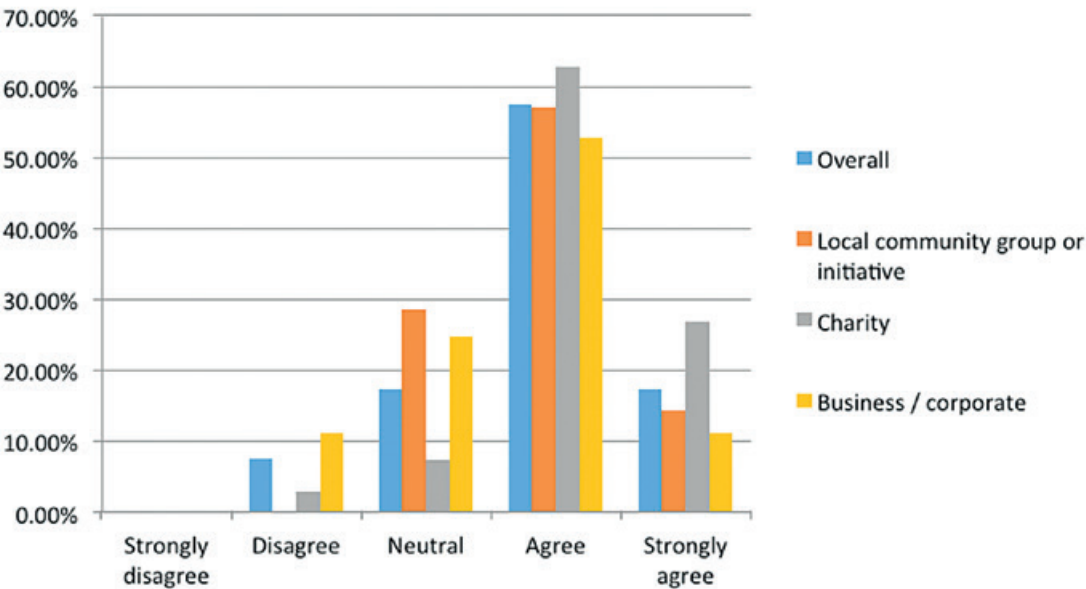
by the company, however they realised quite soon that the match wasn't there. Charities can also provide businesses with consultancy skills and other services, so that the businesses could actually benefit themselves by collaborating with charities and community groups. Businesses are often not aware of what they can get out of this collaboration, apart from reputational benefits.

Survey data evidence

75%

of respondents agree or strongly agree that working with communities on local projects and initiatives makes a business more successful

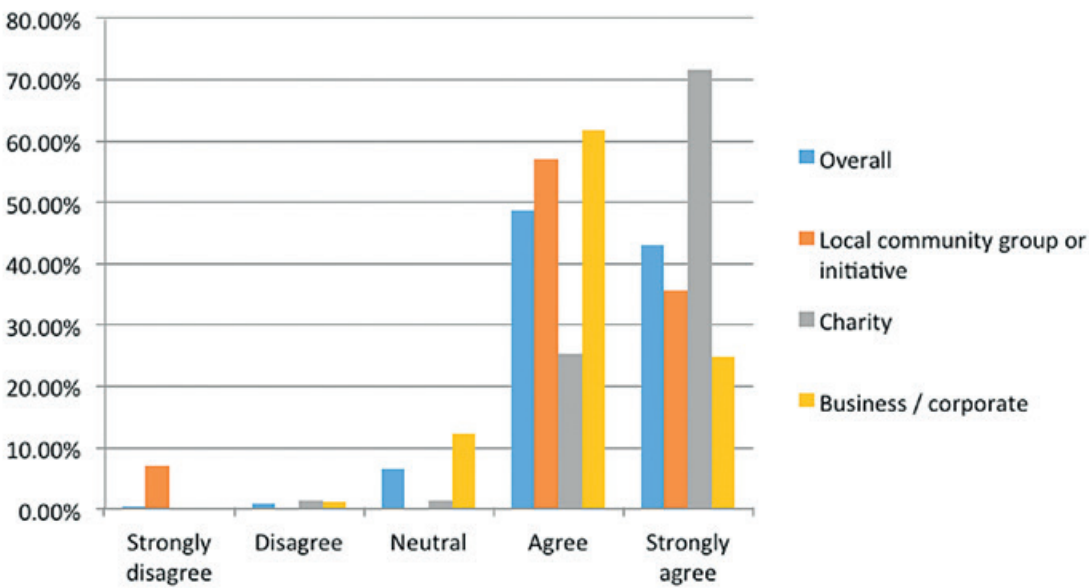
Do you agree or disagree with the following statement: ‘Working with communities on local projects and initiatives makes a business more successful’



91%

of respondents agree or strongly agree that working with communities can benefit both the employees of the business and the community volunteers in developing new skills and experience

Do you agree or disagree with the following statement: ‘Working with communities can benefit both the employees of the business and the community volunteers in developing new skills and experience’



Greater understanding maximises potential

For a collaborative project to be successful both sides need to assess, recognise and communicate their needs and wants. The maximum potential of the partnership needs to be explored. The resources, skills and services of both sides should be laid out so the two organisations can connect together in a way that maximises impact and benefits for both sides - like lining up puzzle pieces to fit together.

Businesses, charities and community groups all agree that while there is a mismatch of expectations, there are also mutual benefits to be gained by all parties.

It is important that all parties recognise their primary needs and what they want from a potential collaboration with another organisation. The research showed that businesses, charities and community groups, while keen to collaborate, are not always aware of what they need and want from this relationship, which can cause misunderstanding and unfulfilled expectations. **Better preparation prior to finding a partner could avoid problems later on.**

“Where it has worked well the expectations and desired outcomes from both partners are identified at the start and the initiative structured accordingly.”

Anon Charity

Recognise the needs and wants to maximise potential

Both businesses and community groups/charities need to develop a better understanding of what the other party can offer in order for collaborative projects to be more successful.



68%

of respondents agree or strongly agree that businesses don't really understand what community groups and charities need

Key research takeout

Improving communications

The research, and output from the subsequent Roundtables, clearly indicates that there is plenty of scope for communications to improve.

Several participants in the research – from both sides of the partnership- explained that they had encountered (mainly) smaller charities and community groups whose grasp of the way business works was quite poor. Simple courtesies and organisational skills, ranging from being on time for appointments to acknowledging that companies are in business to make a profit, were cited as being lacking in many relationships.



Greater understanding maximises potential: Conclusion

Businesses, charities and community groups recognise that mutual benefits are there for everyone, however they need to fill the mismatch gap which is preventing successful relationship to happen. To do so, all parties need to be, first of all, clear about

their needs, their requirements, their expectations and they also need to know what they can actually offer to the other partner during the collaboration. Communication is a two-way process.

CASE STUDY: Engagement

One company, who take charitable giving very seriously as part of responsible business, told of a charity that they had selected to support by way of donations. The partnership was promoted within the business and employees encouraged to support the cause. However, the company found the charity very difficult to engage, there was no communication back and the relationship was entirely one-sided.

All parties need to be very clear about what they can offer, how they can collaborate and whether their profiles actually fit with each other.

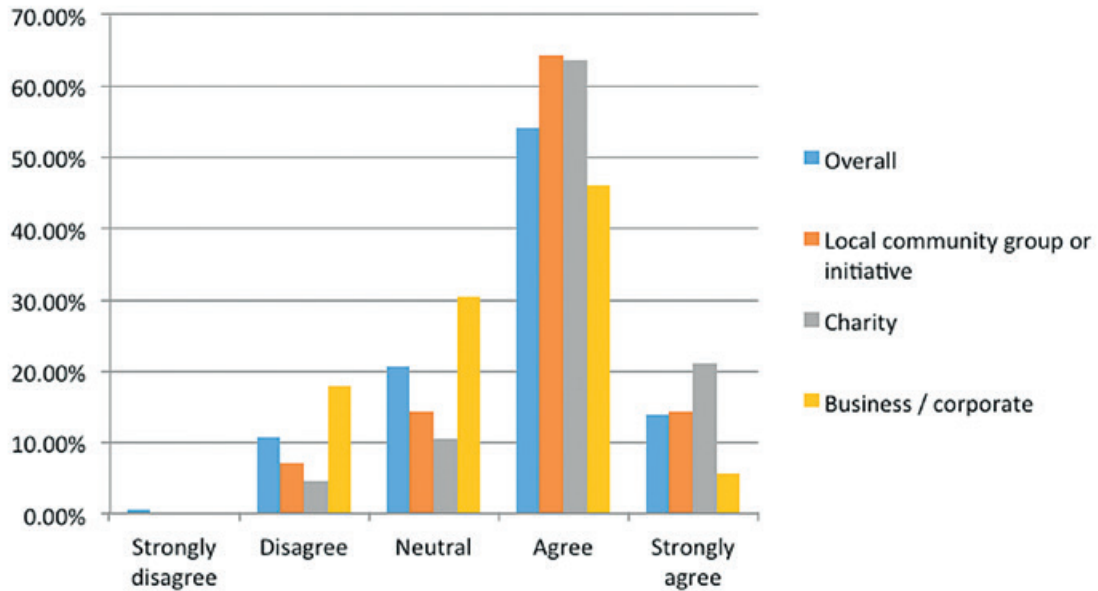


Survey data evidence

68%

of respondents agree or strongly agree that businesses don't really understand what community groups and charities need

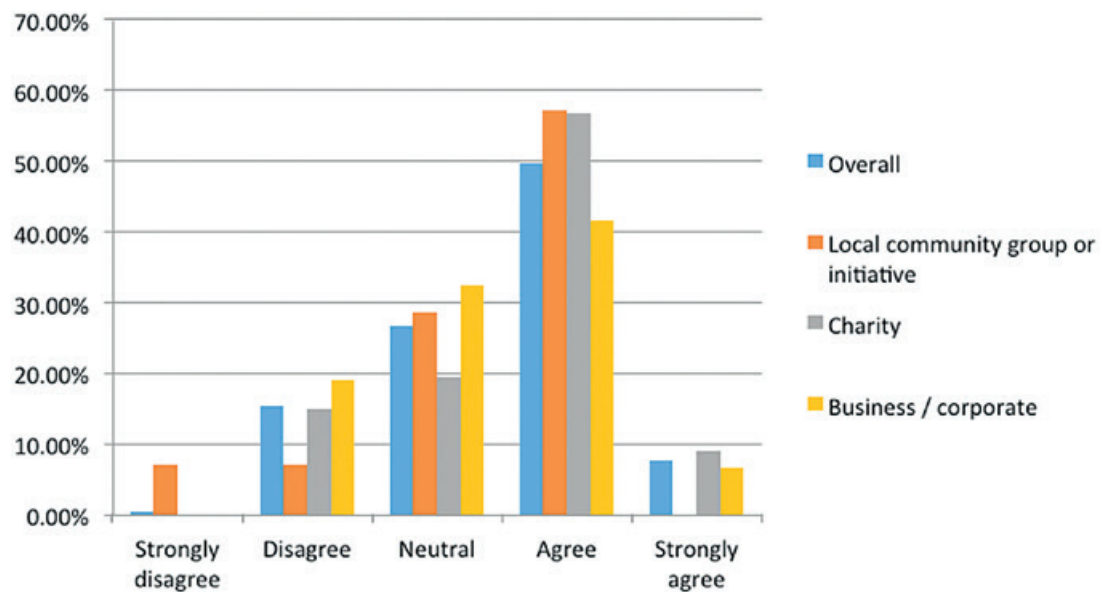
Do you agree or disagree with the following statement: **'Businesses don't really understand what community groups and charities need'**



57%

of respondents agree or strongly agree that community groups and charities don't really understand how businesses can help them

Do you agree or disagree with the following statement: **'Community groups and charities don't really understand how businesses can help them'**



Appropriate donation: the contribution balance

Contribution of skills and experience is almost as important as financial contribution.

The most effective collaborations have a balance between contributing skills and contributing money that facilitates the delivery of an excellent project, with learning and skills development achieved on both sides of the partnership.

Too much financial contribution without skills contribution leads to businesses benefitting little from the collaboration and partnerships being weaker and short-lived. Conversely, too much skills and experience contribution without sufficient financial donation can be a burden on community groups and charities, as often it costs them money to bring business employees into their

organisation or deploy them on projects; particularly the more traditional forms of volunteering, where teams of employees are deployed for a short period to restore, refurbish or repair community assets.

Participants in the research acknowledged that giving and receiving financial support is extremely important. Charities and community groups all agree that they need money. However, there is a misconception held by some businesses that helping charities via financial contribution is sufficient. Money is important but this is not the only way businesses can help charities.

Get the contribution balance right: Appropriate Donation

Contribution of skills and experience is as important as financial donation. The most effective collaborations have a balance between the two.



Key research takeout

Providing charities and community groups with skills and helping them to be more business-like, testing their business model, would help small charities and community groups in achieving their aims, in an increasingly competitive marketplace.

Many participants in the research felt that smaller community groups would do well to adopt more

effective business principles and practices in order to be successful. However, they haven't traditionally had the resources, skills and knowledge to do so. Meanwhile, businesses are ideally-placed to provide that support, which could range from specialist consultancy services, financial planning, marketing and PR through to more practical skills.

“ [Partnerships] can tap into knowledge / skills not held by the community and they can help overcome financial constraints. Partnership should enable better results. ”

Anon Community Group

“ It’s not about the money but practical support and what employees can learn - two way street. ”

Anon Charity

Appropriate donation: the contribution balance: Conclusion

Making a contribution that is appropriate to a community’s needs is another essential element that could make a potential collaboration between businesses, charities and community groups more worthwhile. Having clear objectives from the outset, knowing what to expect from collaboration with other organisations and establishing the right type of contribution, based on needs and requirements, makes for a positive outcome for all parties.

Skills

Community

Encourage

Resources

Experience

Partners

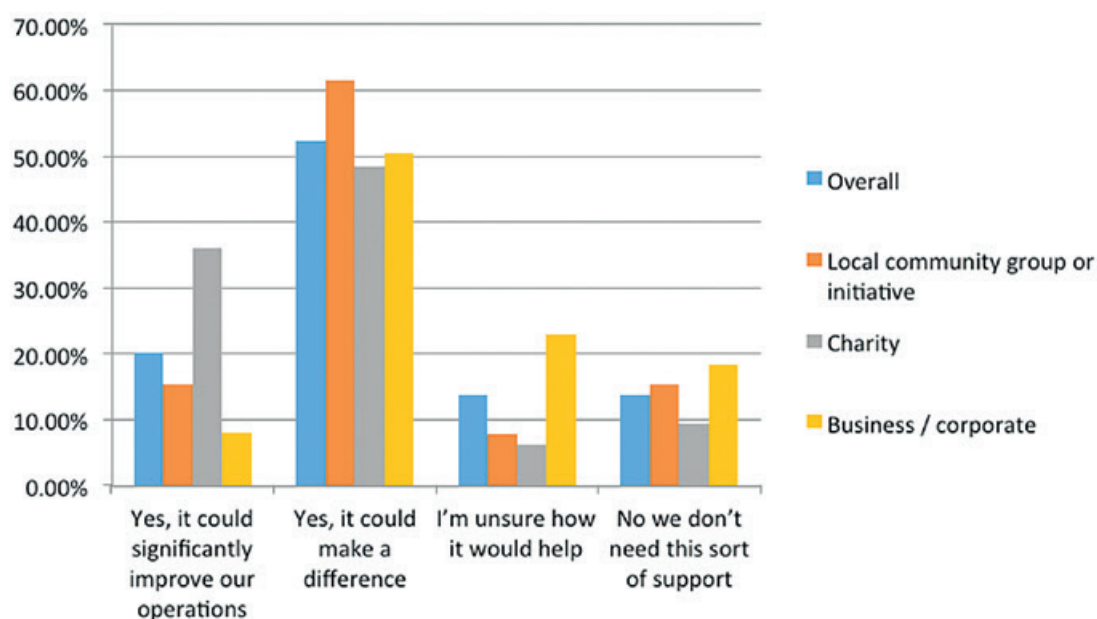
Charity

Together

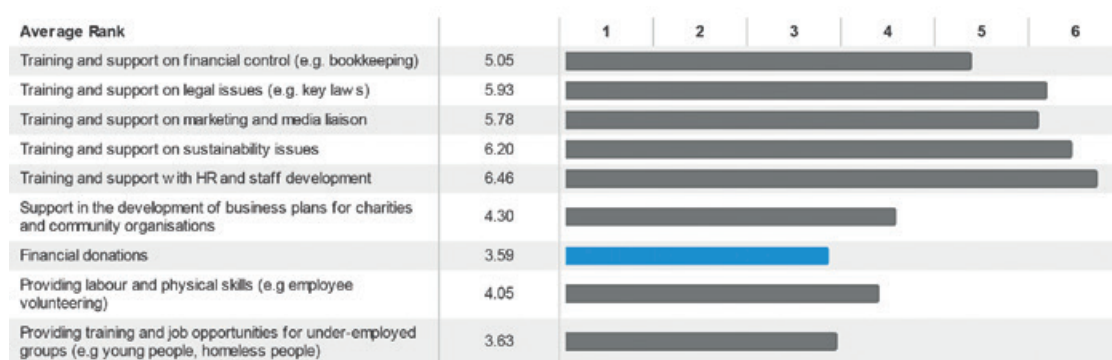
Survey data evidence

72% of respondents say skills based volunteering would either make a difference or significantly improve their operations

Do you feel skills based volunteering could help your organisation?



Which of the following resources would best help community groups, charities and businesses work together more effectively?



CASE STUDY: Working together

A small, local school community group needed additional accommodation. It was felt that a builders' cabin would be suitable and plans were made to raise money to buy and refurbish one, with the anticipated cost being around £10,000. A local businessman volunteered his knowledge of the construction industry, and his negotiating skills. A firm willing to provide a cabin at significantly reduced cost – as part of their own charitable contribution – was persuaded to help and the community group got their accommodation for a fraction of their anticipated budget. The businessman had contributed his skills and the cabin owners had helped by providing their expertise and materials to solve the problem.



CASE STUDY: Big 4 Professional Advisory Firm

This business consulting and financial advisory specialist recognises the value that skills-based volunteering can deliver, not purely to charities and community groups but also to their own teams. They also understand that services have a value and this value needs to be recognised by both parties. To avoid open-ended commitments to encourage clear communication and manage expectations on both sides, the firm provides charities with a “budget” to call off services. The firm then works with the charity to select the type of support – e.g. tax advice, accounting, HR support, business planning, strategy etc – most suited to their needs. On the company side, the firm runs the engagements in the same way as standard client work, on a discounted internal rate, thereby ensuring that a high standard of support is delivered. The staff involved have time acknowledged and their contribution assessed as if it were a client project. This system encourages the charity to provide a clear brief of what they need, gives them a range of skills-based volunteering opportunities to choose from, focuses on a deliverable outcome and avoids the type of open-ended commitment to support that some companies have identified as a potential pitfall.

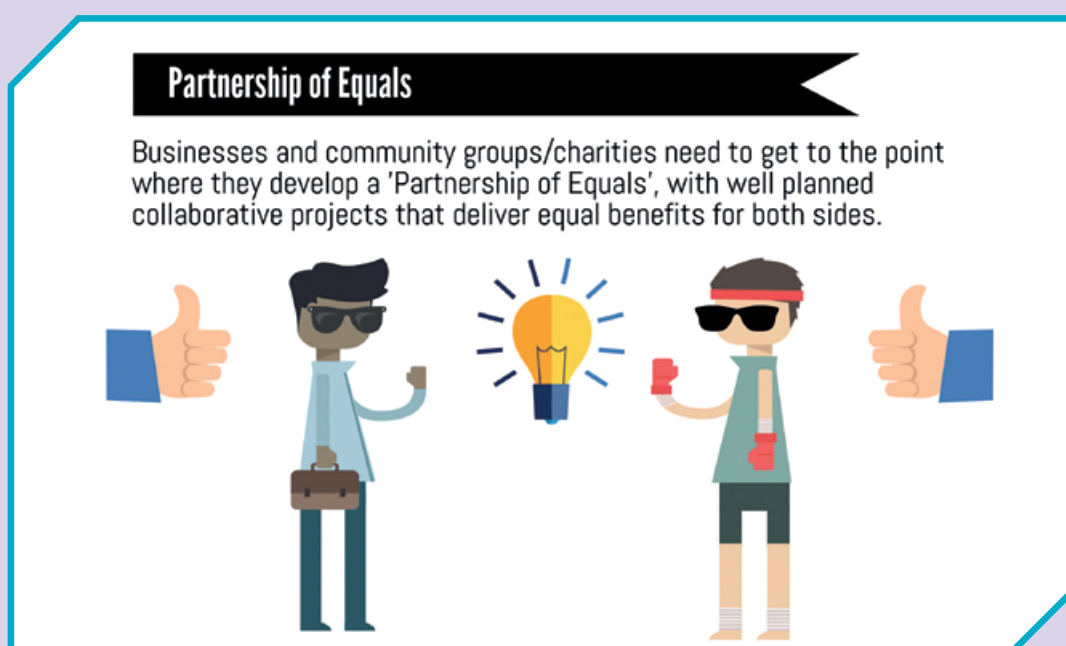


Developing a Partnership of Equals

It's not about give and take, but give and gain

Getting businesses and community groups to really understand what each has to offer the other, and that there are gains to be had on both sides, is the ultimate objective. Currently, neither side fully understands what the other can offer, why they want to be in partnership or how they operate. Community groups and charities (particularly smaller, local organisations) often don't understand how businesses operate; their time constraints structure and needs.

The interviews conducted with stakeholders, the online research and the Roundtable discussions all underlined the willingness of all parties to collaborate, creating a strong partnership and the desire to build a **partnership of equals**. However, in practice the reality currently falls short of the aspiration.



What businesses could gain

Several of the smaller local community groups interviewed possess a wealth of skills and knowledge that companies could benefit from. This aspect of the partnership has tremendous potential for businesses. They need – and want – to understand more about how communities in which they are present behave and function, particularly as this may often be exactly

where their customers come from. Getting to properly understand local cultures, wishes and concerns is vitally important to the success of any business that takes community engagement seriously. Yet the rich vein of knowledge and experience present in even the smallest local group is often overlooked.

Key research takeout

A small number of business/community brokers (or business connectors) were interviewed as part of the research. It was significant that where a role existed, the problems encountered and concerns raised elsewhere in the research were not seen as material.

An intermediary who understands the needs of a local community and is well-connected with business can be a very powerful asset in delivering the

Partnership of Equals

Business

“The most sustainable solution to benefit charities and business is to encourage staff from business to develop longer term relationship with local charities.”

“We get relationship benefit from both sides.”

Community Group and Charities

“That’s a relationship of equals. We have an issue, we have a problem, can you help us resolve this problem, how would we co-produce something together to ensure that this consultation exercise works well together and can be implemented well and be measured”

“Recognising the assets that exist inside both parts of organisations and developing the assets together. So in other words you seek an equal relationship rather than a relationship of inequality”

“Creating the relationship and confidence that they can contribute, there must be a balance. If you want to be treated professionally, I need to offer the same back”

“Partnership of equals, I believe that’s what we are striving for”

“Recognising the assets that exist inside both parts of organisations and developing the assets together. So in other words you seek an equal relationship rather than a relationship of inequality.”

Gary Copich
Peoples Voice Media (Social Enterprise)

Developing a Partnership of Equals: Conclusion

The term Partnership of Equals was discussed with the Roundtable audiences. It was agreed that this should be the ultimate outcome of any relationship between business and the community, benefiting both parties.

“Partnership of equals, I believe that’s what we are striving for.”

Emma Brophy CRASH (Charity)

CASE STUDY: Mental health

A small, local mental health charity provides consultancy services to businesses in their area. They offer help and advice on spotting the early signs of depression and coach companies on the seasonal variations in workforce malaise. This valuable consultancy can help firms identify early signs of depression, reduce absenteeism and build a more resilient workforce.

Charities in particular claim that sometimes businesses do not treat charities and community groups with the same level of respect and seriousness as they would other businesses. There is a need to unpack the old perception of charity.



Suggested new solutions

Our research shows that some issues exist with matching the right businesses to the right charities. During the Roundtables, attendees were given the results of the online research and encouraged to discuss which solutions might be available:

- a) to fill the mismatching gap and
- b) to create strong and successful relationships between charities/community groups and businesses.

Participants mainly talked about the importance of:

1. local networking and matchmaking events
2. online brokerage services
3. improving communication

These three main ideas are explored in this section.

It is important to note that key quotations have been taken mainly from our two Roundtable discussions for this section. Solutions – rather than problems – were mainly discussed during these events.



Best practice models

Based on the research findings, additional input gained from the detailed interviews and Roundtable events, as well as further contributions from its team of community engagement officers, Carillion has developed advanced working models for two likely scenarios, which can be found in the Appendix of this Report.

The first provides suggested improvements to the partnership between businesses and community groups and smaller, local charities. The second focuses on the relationship that could be enjoyed between businesses and larger, corporate national charities. Both models are developed around the concept of a **Partnership of Equals**, which has been proposed in this Report.

“ The only way is for business to get talking to their community and get amongst it, understand what problems and issues you can help with, help your own people to feel inspired enough to get involved. ”

David Picton Carillion

Effective matchmaking through local networking events

Charities, community groups and businesses all agree that there are not enough truly effective networking events – leading to practical outcomes that move relationships forward – and there is insufficient local focus on engagement between parties. Organising local events or local networking – aimed at specific calls to action – would help to improve communication between businesses and charities.

Larger businesses tend to work with large, national charities. There is a big opportunity for smaller, local community groups to become better known to large businesses who have a local presence, through networking events.

Small charities in particular need to build better contacts with bigger businesses, in the spirit of encouraging the **Partnership of Equals**. With increasing competition for business support, largely as a consequence of cuts in local government funding, many smaller charities are

struggling. Also, with the gap widening between large, media-aware, well-managed national charities and smaller groups, the need for improved matchmaking opportunities that help to promote the relevance of supporting local initiatives is becoming more important than ever.

Online or face-to-face?

During the latter stages of the research, the idea of networking and matchmaking was developed with participants in the telephone interviews and roundtables. There is a place for online support, particularly to help partners find a good match. However, the consensus of opinion was very much that face-to-face events, in local communities, could make significant contributions to more effective partnerships.

60% of respondents think regional matchmaking events would best help community groups, charities and businesses work together more effectively



Brokerage services

The power and effectiveness of business connectors or brokers was acknowledged by participants in the research. Where it is feasible and economic, brokering partnerships through an individual with good local knowledge will help to accelerate positive and successful relationships between parties.

Ultimately, a national brokerage with support and representation locally, which is able to match businesses and charities or community groups with their ideal partners would be a major step forward in closing the mismatch gap. In practical terms, a web-based service would provide much needed access to a skills and requirements database. This would enable companies to research local community groups in detail, whilst also providing community groups and charities with a platform to put their case forward. At a higher level, national charities and businesses could pre-select their potential partners, looking for an ideal match of skills, objectives and beliefs.

A successful brokerage service should provide all parties with clear information about what the other does, what its aims and objectives are and what it can offer to the other partner.

The research acknowledges that some match-making and brokerage services and online platforms are already available. However, it was clear from detailed discussions with stakeholders that there is no service currently which can fully address the issues raised by participants in the research and, in particular, aid the delivery of the **Partnership of Equals**.

The practicalities of building and using a brokerage service are yet to be tested. There would also be the issue about who should pay for the service.

“ We use an online platform at first but then you need some human touch. So I think a mixture of the two is very important. ”

Lynn Sbailh Give2Gain Timebank Stockport

“ Work with experts in the brokerage field that can conduct needs assessments on behalf of charities and community groups. ”

Lauren O’Leary BITC

Improved communication

What has emerged from our research is that communication and understanding are key to make collaboration work. Understanding what the other organisation is doing and how they work, and understanding what they want from each other is essential. Everyone wants to achieve a strong relationship and a mutual understanding. The problem seems to be how to get there.

Signposting resources

There was mixed reaction to the idea of developing Guides and Handbooks. Most participants in the Roundtables and interviews agreed that guides are useful, but commented that plenty of information is already available. What would be more valuable is a central resource that signposts where the information can be found.

Internal communications

Improving internal communication, particularly to keep employees better informed about a company's charitable giving and active participation in local communities, is regarded as a priority. Involving employees in decision-making, building the relationship with local groups and of course their active participation in skills-based volunteering will help to cement the relationship between business and community.

Leveraging the media

External communications, particularly by engaging local and national media, is beneficial to both parties. Raising awareness of the important role that businesses play in supporting local communities, as well as the increasing levels of understanding between businesses and charities of each other's wants and needs.

“Establish communication channels and identify specific individuals to become champions for them.”

Anon Business



Next steps

The Roundtables, interviews and online research undertaken on behalf of Carillion provided a detailed analysis of the working relationships enjoyed between businesses and communities. Overall there is agreement that a mismatch of expectations exists between the two parties. Stakeholders also agreed broadly that both businesses and charities/community groups have more to offer the other, if ways could be found of improving the dialogue, and hence level of understanding of needs and wants, between them.

The research showed a willingness of all parties to improve collaboration, create stronger partnerships and build a **Partnership of Equals**. Financial support is important, but not essential, and all parties would benefit from each other's skills and knowledge.

Skills-based volunteering ranked very high in the online survey results as results as something that businesses could offer charities and community groups.

Possible improvements to the current relationship models have been provided in this **Insights Report**. Potential ways in which the gap in perception, needs and opportunities – the mismatch – could be closed were explored in more depth during the individual interviews and Roundtables. These have been expanded and discussed in the previous section of this Report: Suggested New Solutions.

As several participants in the Roundtables observed: the research commissioned by Carillion provides an important and valuable contribution to improving the outcomes from the partnerships between businesses and communities. Participants also counselled that it is what happens next that will really make a difference. The outputs from the research need to be acted upon in a practical fashion, that will deliver the improvements in working relationships and communications that have been so clearly identified.

“We all seek to do better and to learn about each other, meeting businesses and maybe potential partners. This research has been a great opportunity for businesses and charities”

Anon Charity

Conclusions

The research described in this Insights Report delivers five main findings regarding the relationship between businesses and charities or community groups.

1. There is a mismatch between the needs and wants of both parties in the relationship
2. Effective collaboration will ultimately benefit both parties, and the community as a whole
3. Recognising needs and wants on both sides will help to maximise the potential of any working relationship between businesses and charities or community groups
4. The contribution balance relies as much on skills-based volunteering as it does on financial support.
5. Developing a Partnership of Equals relies on both parties fully understanding each other's objectives, so that gains can be maximised for both sides.

Significant benefits could flow from a better understanding of the needs and wants of individuals or organisations involved in charitable support for local communities. In particular, this research has identified that more work needs to be done to cultivate that understanding and help to deliver relevant volunteering, financial aid or other support that is most appropriate to the situation. Two possible models for improving engagement and delivering well-formed outcomes are included in this Report.

Perhaps somewhat surprising was the universal agreement that more can be done to help broker relationships between businesses and charities or

community groups. Although some networks exist already, the general consensus – particularly the output from the Round Table discussions – was that there is a need for better face-to-face networking as well as some form of match-making service.

Drawing on the findings of the research, this Report proposes three core solutions:

1. Local networking and matchmaking events
2. Online brokerage services
3. Improving communication

The research undertaken to produce this Report was detailed, extensive and structured. The work was supported by Carillion, but it did not influence the outcome beyond offering practical experience of community engagements, alongside other research participants. The findings and suggested solutions have been tested across a variety of stakeholders and the idea of a Partnership of Equals resonated with many as being “right time, right place”. However, the point stressed by several stakeholders during the research was the need to take action and progress the opportunities for improvement which had been identified.

For the solutions proposed in these pages to become meaningful, businesses, charities and community groups need to work together to build more effective relationships. Hopefully the ideas and guidance provided in this Report will act as a catalyst for positive change.

Call to action

This report plays an important role in helping to illuminate the issues which can create gaps between businesses and charities or communities. The one thing which all stakeholders agreed on during the research was the need for action; practical measures which could help to address these issues to forge closer and more effective working relationships. Essentially, the creation of Partnerships of Equals, which bring deeper benefits for both sides of those relationships. A greater focus on skills-based volunteering, a better contribution balance and more effective communication will require specific actions.

For Carillion's part, we will commit a 'Partnership of Equals' action plan here, and a promise to publish two further updates on the impact of that plan. Our Action Plan will include commitments to:

- Create a national network of at least 50 strategic charity 'ambassadors' across our UK operations
 - They will improve communications, support regional network events and match Carillion volunteers to appropriate skills-based opportunities
- Complete a skills audit across Carillion to identify and record our 'skills cache'
- Develop and trial an appropriate platform for skills-need matching as a brokerage service
- Test the effectiveness of our network, audit and platform with 5 national charities
- Assess the scope and options for establishing a wider national brokerage service

We will release our first update during our 2016 Sustainability Week at the end of September, and publish the second in our next Annual Sustainability Report.

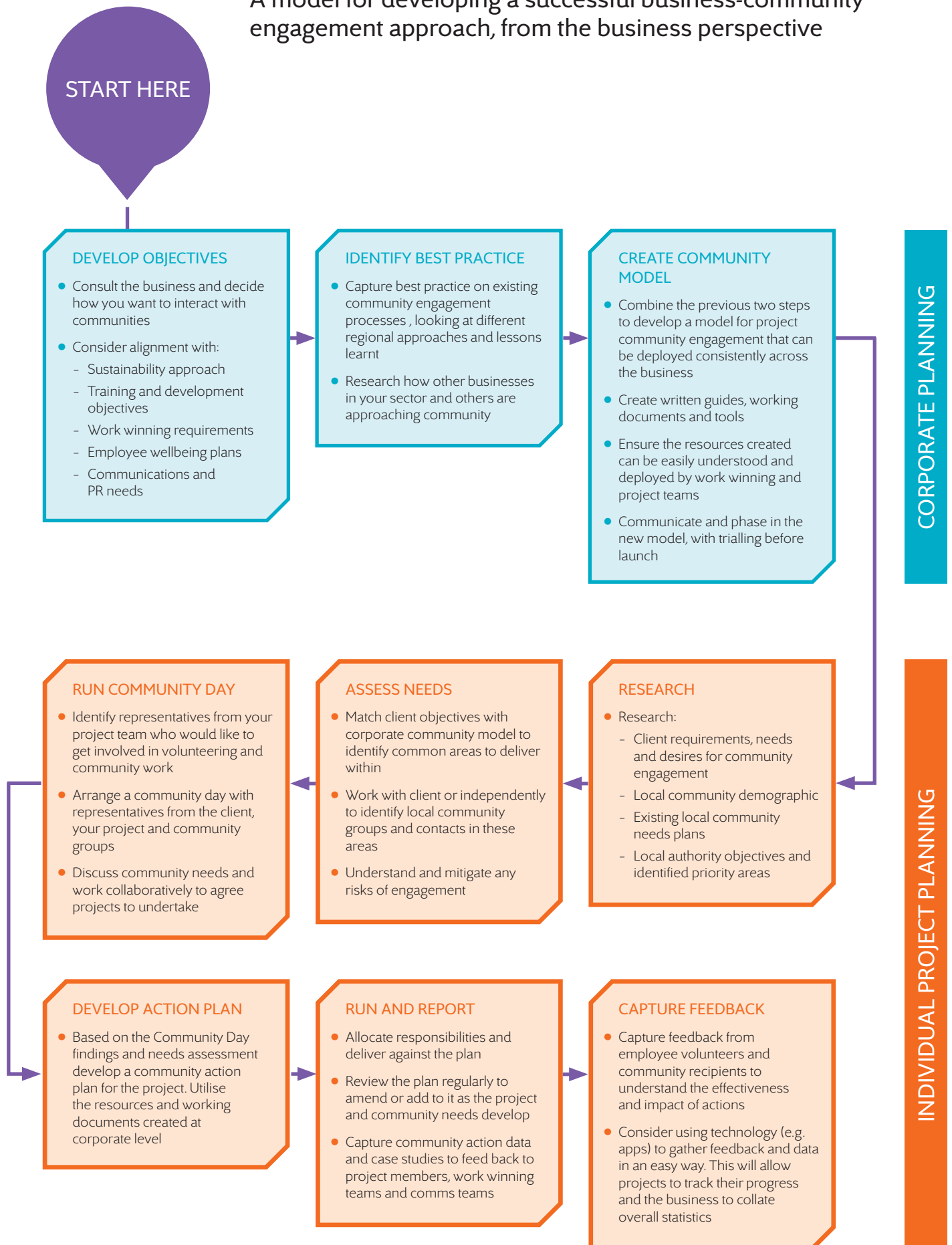
In the spirit of collective impact, we would like to call upon all UK businesses to spell out their action plans and commit to publishing the results, either along the above lines or to build upon their own interpretation of this research. Given that there are two sides to all stories, we would be delighted to see similar approaches from charities and community groups.

We will create a 'pledge page' via our corporate website www.carillionplc.com with scope for other businesses, charities and community groups to publish their simple pledges on that page to answer this call to action. As we said in our foreword, closing the mismatch of expectations, speaking one language, focusing on skills-based volunteering and properly understanding each party's needs and wants are clear steps on the journey to a Partnership of Equals. We hope you feel inspired to act on the outcomes, whichever side of that partnership you live on.

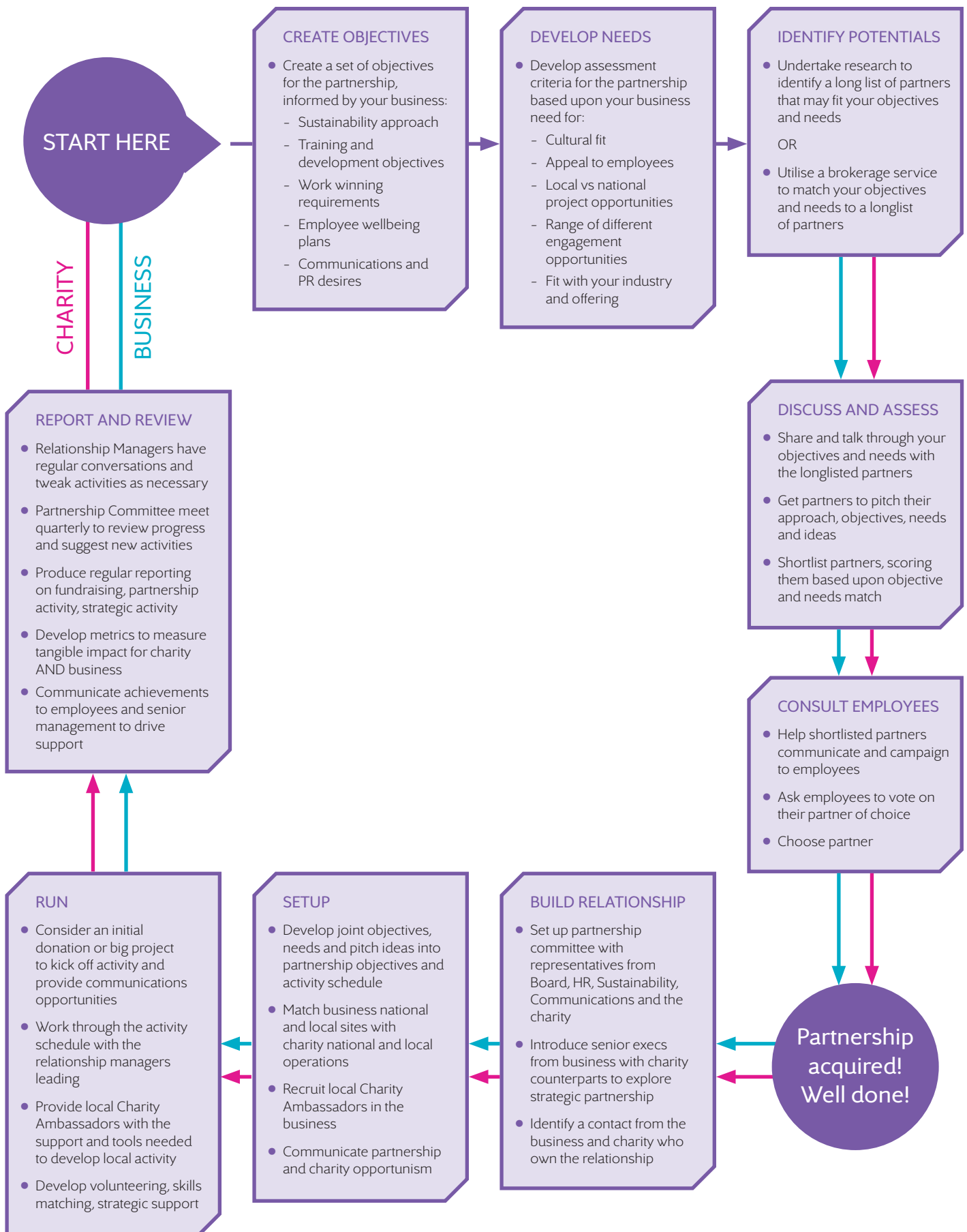


David Picton, Chief Sustainability Officer

A model for developing a successful business-community engagement approach, from the business perspective



A model for developing a successful business-corporate-charity partnership of equals, from the business perspective



Carillion is a leading integrated support services company with a substantial portfolio of Public Private Partnership projects, extensive construction capabilities and a sector leading ability to deliver sustainable solutions. The Group had annual revenue in 2015 of some £4.6 billion, employs around 46,000 people and operates across the UK, in the Middle East and Canada.

The Group has four business segments:

Support services – this includes facilities management, facilities services, energy services, utilities services, road maintenance, rail services, remote site accommodation services and consultancy services in the UK, Canada and the Middle East.

Public Private Partnership (PPP) projects – this includes investing activities in PPP projects for Government buildings and infrastructure mainly in the Defence, Health, Education, Transport and Secure accommodation sectors in the UK and Canada.

Middle East construction services – this includes building and civil engineering activities in the Middle East.

Construction services (excluding the Middle East) – this includes building, civil engineering and developments activities in the UK and construction activities in Canada.

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