



Oxfordshire Engage event feedback report

Prepared For:
Oxfordshire Engage

Date:

March 2024





































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Executive summary

Oxfordshire Engage was created to address a recognised need for better collaboration between charities and businesses.

The event, sponsored by Get Radio and hosted by Leonardo Royal Hotel Oxford, took place on the 11th March 2024 and saw 40 representatives from businesses and charities come together for an afternoon of open, constructive and creative conversations. All attendees were divided into groups and then invited to discuss all five topics, which were then fed back for general discussion.

The following report provides details of the day, including breakdown of attendees and aggregated learnings for each topic, which was discussed on the day. It also highlights suggested solutions, provides an overview of the main takeaways (as reported by the attendees) and provides some light-touch recommendations from the committee responsible for the event.

Summary of key learnings

Practicalities of collaboration between charities and businesses

- All organisations involved in a partnership should be clear on the value exchange between them. This creates mutually beneficial relationships, where all resources (not only financial) are recognised, expectations are managed, processes and commitments are respected, and all partners feel empowered.
- It is hugely beneficial for partnerships to

- be built on shared values and vision.
- Barriers include: resources needed to build and manage relationships, ability to contact the right person within an organisation, and partners underdelivering on promises.
- Potential solutions were: creation of a Service Level Agreement for partnerships, businesses displaying their charity policy/guidance in a public domain, and regular events bringing charities and businesses together.

Volunteering

- There is a need for a change of narrative around volunteering - supporting people to see the benefits a volunteering opportunity can bring to them (e.g. improved leadership and development of skills).
- It is important that both businesses and charities have a clear understanding of their own value and needs. This supports a more creative approach to volunteering opportunities and other forms of support.
- Support is needed to build in volunteering opportunities for staff and then encourage them to engage.
- It is essential that all partners have a good understanding of the impact the partnership has on beneficiaries, their own staff and organisation, and other partners.
- Suggestions for creative approaches to volunteering include 'sharing' of volunteers, matching platforms and volunteering packages for businesses.

Models of support

Recognised benefits of a Charity of the

- Year model include: ease to engage employees and profile raising.
- Challenges highlighted for the Charity of the Year model were: complex application process, potentially emotionally driven and competitive.
- There is a preference for long-term relationships, which last past the 12months mark.
- Sharing of values and purpose is seen as a good basis for a partnership.
- Other support models could be based around skills share, sharing of equipment or venues, sponsorship of events/projects, support to pitch to other businesses, and 'passing the baton'.

Mutual benefit

- Most common motivations for businesscharity partnerships reported were: fulfilling Corporate Social Responsibility, delivering social value, improved profile within a local community, and a collective approach to addressing an existing issue.
- Other benefits included improved staff engagement and retention, building connections, and gaining further insight which can positively impact business strategy.
- All partners should be able to measure and understand the impact that the partnership is having on them.
- Partners should have an understanding of the strain on resources that the partnerships is having on all member organisations.
- Each partner should have a clear understanding of each other's needs as well as the value they each bring to the partnership.
- It has been acknowledged that supporting charities is sometimes a 'box ticking exercise' and is unlikely to lead to a partnership.
- Further ideas supporting mutually beneficial relationships included: businesses pitching to charities they want to support, ensuring equal balance

of power, and business support to shape further partnerships.

Ensuring sustainability

- It was felt that a change in narrative about charities, especially their funding models, would have the biggest impact on the sustainability of the sector (highlighting the importance of core funding and its role in enabling for other projects to be delivered).
- Putting the focus on non-financial support provided by the business community was seen as one of the more practical ways of supporting the voluntary sector.
- Supporting a more collective approach to the sustainability of the sector was seen as beneficial, including sharing of resources and increasing the ability to access bigger funding pots.
- Other solutions included: clarifying the impact and value of the partnership, supporting unrestricted funding, including sustainability support in projects' planning stages, and match funding.

Main takeaways

When asked what would the ideal outcome of Oxfordshire Engage, the largest proportion of attendees replied:

An improvement in relationships between charities and businesses.

When asked about the one action that attendees would like to take as a result of taking part in the event, the most common answer was:

To engage in more meaningful, targeted, and beneficial relationships [between businesses and charities].



Introduction

When I started in the charity sector just over a year ago, I wanted to understand what the challenges and opportunities were for business and charities collaborating in Oxfordshire.

I began talking to – and listening – to colleagues from both sides of the coin and a pattern started emerging.

Local charity colleagues I talked to were telling me the importance of working with local businesses but the challenges they faced with doing so. From managing expectations on volunteering to the resource it takes to manage short term partnerships. One colleague told me "The charity of the year merry go round is exhausting."

Meanwhile, when chatting to local business leaders, I was hearing that they want to support charities but the choice of who to work with is overwhelming and the demand for their time and money is also exhausting.

I began to think, maybe we need to get everyone in the room to have a chat about this. See if we can make some headway on some of these roadblocks.

And thus, Oxfordshire Engage was born.

Right from the start, the goal of Oxfordshire Engage has been to facilitate open and honest conversation between businesses and charitable causes in the county, to better understand how we can work together more effectively and deliver greater and longer lasting impact for our communities.

The purpose of the event was to provide an environment for that reflective dialogue to take place. Over just a few short hours we covered a vast range of topics and put forward real and practical solutions to the needs we identified together. In the pages of this report, you will read about those collective insights and ideas. Armed with this data, we can now work in harmony with the other organisations in the city to put those recommendations into practice.

Some of these ideas may seem like little changes. But lots of small gains adds up to big wins.

Thank you for reading. We look forward to taking the next steps together.

Naomi Stewart Hale

Naomi Stewart Hale Chair, Oxfordshire Engage



Events committee

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Oxfordshire Engage is very lucky to benefit from the wealth of experience, knowledge and connections provided by its committee members.



Naomi Stewart Hale Chair, *Oxfordshire Engage*



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Why now?

Currently we are seeing a culmination of significant shifts and factors, which open up a perfect opportunity for cross sector collaborations. It is therefore important to ensure that those are deployed as effectively as possible.

Companies are increasingly seeking ways in which they can have more positive impacts on society, local communities and the environment. They are also looking to make themselves more attractive to the people who work for, buy from, sell to and invest in them. Oxfordshire is a county which has more job vacancies than those seeking employment, so it's important and cost-effective for employers to try to attract and retain staff, by operating ethically. The introduction of the Social Value Act and further increasing demands from clients, especially the public sector, require businesses to demonstrate how they are adding social value to win contracts.

The public sector is constantly under pressure to address serious and pervasive social issues, but with less funding available, it has to be more creative. Using Social Value Procurement policies, suppliers can support strategies and policies in ways that are beneficial for all involved. Increasingly, these tier 1 suppliers are now also making more demands of their supply chains to help demonstrate the value of public sector bodies choosing those with more impactful offerings.

The voluntary sector, often left to fill gaps in public sector services, is facing a more difficult and competitive funding landscape. They are therefore seeking ways in which they can develop creative and mutually beneficial, cross-sector collaborations

In this challenging economic and political climate, national and local politicians and parties are looking to position themselves and persuade the public, and electorate, that they are able to deliver some effective solutions. Locally, new strategic plans and policies are being developed to move forward.

Understanding the ways in which powerful, balanced and mutually beneficial crosssector partnerships can help address the challenges we all face, is necessary and urgent to the local economy, communities and society as a whole

Event and attendee details

40

representatives from businesses and charities attended the event

11/03/2024

Attendance rate

78%

Attendee breakdown



Topics covered

- 1. **Practicalities of collaborations** between charities and businesses
- 2. Volunteering
- 3. Models of support
- 4. Mutual Benefit
- 5. Ensuring sustainability

Feedback from the event



1

Practicalities of collaborations between charities and businesses

Like any relationship, it's important to have a clear understanding of the commitments, opportunities and limitations involved. Attendees were asked to discuss their expectations when providing services/support, their expectations when being provided with support by a business or charity, and the practicalities of managing relationships between businesses and charities.

The most common theme raised by the attendees was the importance of all organisations involved in a partnership being clear on the value exchange between them. This not only allows for partners to be clear on their 'return on investment' but also:

- ensures that such collaborations are mutually beneficial
- recognise the value of resources other than money
- allows for expectations and needs to be clear to all
- provides an understanding of each other's processes
- empowers all partners to be equals.

Attendees also highlighted the importance of partnerships being built on shared values and vision, which allows for best matching between partners.

Resources and time needed for development of relationships with potential partners was noted as one of the barriers experienced by both businesses and charities. This not only related to the initial research into potential partners, but also ongoing management of partnerships.

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Long-term meaningful engagement needs capacity, time, resource and skills. This means that, depending on the collaboration, the commitment may not match the impact/fundraising achieved.

Other areas highlighted were:

- ability to contact the right person within an organisation
- partners underdelivering on their promises
- charities having a lot of focus put on raising necessary funds
- lack of consistency in approach to charity-business partnerships
- businesses being overwhelmed by requests from charities (often not appropriate for the business)
- small charities being at a disadvantage due to more restricted resources.

Suggested solutions

Attendees provided some suggestions on how, as a community, we can work together to improve the ease of creating, managing, and the quality of partnerships between charities and businesses.



ISSUE	SOLUTION	DETAILS
Lack of clarity between partner organisations	Service Level Agreements or similar documents	In order to enable high levels of clarity on the expectations, commitments, and needs of each partner, organisations could look at introducing Service Level Agreements or similar documents for each collaboration developed.
Difficulty in connecting with an appropriate organisation	A triage tool or platform facilitating connections based on shared values and interests	Tools and/or platforms could be used to support the connections between like-minded organisations. This would reduce the time needed to research potential partners and support building of more meaningful relationships.
Businesses receiving requests for support, which are not relevant or appropriate	Businesses ensuring that their charity policies and any further guidance on charity engagement are available and clearly visible in the public domain	In order to support charities in reaching out to connect with appropriate businesses, organisations could ensure that any relevant policies and guidance, which clearly states their interests and areas of support, are visible in the public domain, so that charities can access those before reaching out.

ISSUE	SOLUTION	DETAILS
Lack of skills / templates facilitating better partnerships between charities and businesses	Toolkits / templates developed	It could be beneficial for additional resources and training to be developed, which would support both businesses and charities in collaborating in a more meaningful and mutually-beneficial ways.
Lack of a balance of power in partnerships	Empowering charities to be able to name their needs, be clear on the value they provide and reject partnerships that do not work for them	Activities which would empower charities, especially smaller ones, to recognise the value that they can provide to businesses, be able to clearly articulate their needs and feel like an equal partner in any partnership, would be beneficial.
Lack of consistency of approach and support for building partnerships	Regular events promoting business/charity partnerships and adoption of relevant frameworks of standards	There is an appetite for more regular events which would bring charity and business leaders together to give them a safe and open space to be creative about solutions to issues encountered by our communities. Existing frameworks, e.g. B Corp certification, could be used to provide structure and ability to review progress.

Other suggestions for improved collaborations between businesses and charities included:

- increasing the ease with which those relationships can be built
- sharing of best practice and success stories by partners
- charities being able to support businesses in understanding the impact that they are making through the partnership.

Volunteering

be more creative on how they can work together, e.g. hosting fundraising events, providing social media advice, thank-athon. It also allows them to ensure that the relationship is mutually beneficial, for example through a volunteering opportunity being an upskilling path for

middle managers, and seen as a two-way

exchange (charity staff can also skill share

There are multiple models of volunteering that exist for businesses. 'Volunteering days' is one such model that is becoming more and more common as part of the employee engagement and Corporate Social Responsibility offer. Attendees were asked to discuss their organisation's approach to volunteering, challenges with engaging in volunteering they have experienced in their organisations, and what voluntary support do charities need and how those can be met.

High level volunteering, e.g. being a trustee, is an excellent leadership development opportunity.

The most common theme highlighted by the attendees was the need for a change in narrative around volunteering. Rather than being seen as 'giving up one's time', it d be promoted as an invaluable opportunity to skill share and build insight and expertise. There is a whole spectrum of voluntary roles, including advisors, mentors, governors and trustees, that could support people in building up to the next step in their careers and personal lives. These roles can be linked to their professional role but also hobbies and interests, so it might be beneficial for the employers to understand both of those aspects when supporting their employees to volunteer.

Other areas highlighted were:

or be involved in governance).

Another area for improvement reported by both charities and businesses was a lack of clarity in what support was needed and what support could be offered. Attendees felt that organisations should be clear on their needs, skills and resources that could be shared. When building such relationships, there is an opportunity for partners to be open and honest, which in turn allows them to

- the importance of an emotional connection to 'the cause' and challenges in finding roles that are relevant when looking at the employee engagement in volunteering
- being clear on the impact made by people giving up their time/resources
- charities should feel able to ask for non-financial support
- challenges of building in the time for employees to be able to volunteer, as well as promoting employee engagement with volunteering opportunities
- benefits of more long-term commitments rather than one-off engagements
- challenges of risk management
- partners being clear on the impact of their activities might have on the other partners (e.g. costs to a charity when organising a team-building day for a business)
- sharing of best practice
- organisations and employees recognising the benefits of volunteering.



Suggested solutions

Attendees provided suggestions on how to improve some of the challenges involved in business-charity volunteering.

ISSUE	SOLUTION	DETAILS
Difficulties in finding voluntary roles which link to personal values/interests	Platforms matching volunteers to projects	When an organisation is looking to support their employees to undertake roles which are personal to them, it might be beneficial to use platforms that match volunteers to existing roles.
Organisations not being able to accommodate the number of volunteers or the amount of time required for volunteering	Volunteers being 'shared' between multiple organisations, allowing for richer experiences	Organisations could create partnerships which would organise voluntary roles spanning across all partners, thus providing more complex and enriching experiences for the volunteers.
Supporting staff to volunteer	Creation of volunteering packages, including tools to support employee engagement	Partner organisations have a unique opportunity to be able to create 'volunteering packages', which would ensure that needs across the partnership are met, language used is inspiring, all benefits are recognised and impact is clear, shared and celebrated.

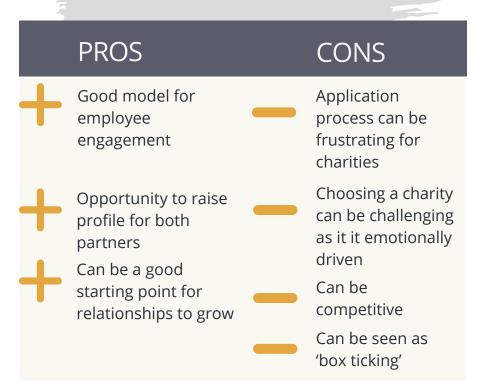
3 Models of support



A common model of charity support is a 'Charity of the Year' partnership, where a charity is nominated, usually by a staff vote, and employees fundraise for the charity over 12 months. But this is just one way in which a business and a charity can partner together. Attendees were asked about their experiences of 'Charity of the Year' model, what has worked well in their organisations, any alternative models of support and their pros and cons.

12 month partnerships aren't long enough for meaningful action. Multi-year options allow for both charities and businesses to build narrative and momentum.

Charity of the Year Model Pros and Cons



Additional aspects of the Charity of the Year model highlighted by the attendees were:

- the model benefits from clear understanding of the commitments and timeframes involved
- it can be 'business-led', which skews the power balance in the relationship

 the model can be financially unpredictable, so it's challenging to predict its impact and added value.

Similarly to previous topics, attendees reported the preference for long-term relationships, which allow for the partners to build a good understanding



of each others needs and create a mutually-beneficial collaboration. They also allow for creation of more than one key contact at each organisation, further support to be delivered, increased security for the charities and greater alignment of purpose and vision.

Alignment of values and purpose, and relationships being mutually beneficial were highlighted as important building blocks of strong partnerships.

Other areas highlighted were:

- there are some businesses who just want to donate, without building a more complex partnership
- a need for a change of narrative from 'Charity of the Year' to partnership/relationship, implying an even balance of power
- opportunity to create collectives, which are linked through supporting the same cause/purpose
- some approaches from charities not being tailored to the business
- businesses being unaware of the resources needed for charities to apply for support
- it's beneficial to have staff involved in the process of creating a charity partnership.



Creative solutions

Other support models based on:

- skills share
- sharing equipment or venues
- sponsorship of events/projects
- support to pitch to other businesses
- 'passing the baton' referring charity partners to other business within the network

Brokerage platform/forum which would support charities, especially smaller ones, to find out about opportunities to link with businesses. It would also support businesses to partner up with a wider spectrum of charities.

Businesses making their opportunities and selection criteria clear and visible.

This would allow charities to make more informed choices on which organisations to approach, tailor their approach to the selection criteria and allow for more planning with regards to their activity.



4 Mutual benefit

RESEARCH OXFORD

- EMPOWERING POSITIVE CHANGE -

Many businesses use the phrase 'giving back', when asked about their motivations behind charity partnerships. Attendees were asked to discuss:

- what are the other benefits to working with charities
- what were other motivations behind charity-business partnerships
- how organisations chose which causes to support
- the practicalities of adapting the national model of charity partnerships (brands partnering up on the basis of strategic alignment or mutual benefit) on a local level
- how businesses communicate benefits of partnering up with charities to their internal and external audiences.

The most common motivations for business-charity partnerships reported by the attendees were:

- 1. Businesses fulfilling their Corporate Social Responsibility / delivering social value - it's been reported that there is more pressure on businesses to be able to show their additional value
- 2. Improved profile within the local community this ranged from the public perception of an organisation as a local leader, through gaining insight into and engaging with potential new customers, to improving the lives of our local communities.
- 3. Collective approach to tackling an existing issue both charities and businesses recognised the importance of seeing the impact of their work and highlighted that

partnerships can hold more power than individual organisations.

It's a relationship. Everyone brings something to the party.

Other benefits highlighted were:

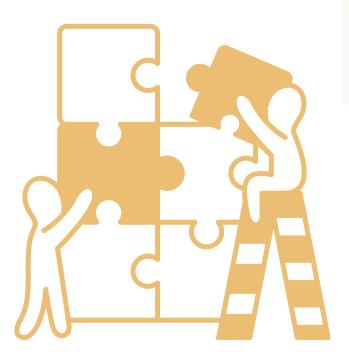
- improved staff satisfaction and retention
- ability to gain further insight, which has a positive impact on shaping the business strategy
- being able to support a cause that is important to the organisation
- ability to build connections with other businesses, that are in partnership with the same charity
- more opportunities to network
- the 'feel good' factor
- ability to engage with staff
- tax breaks
- B Corp scoring.

Attendees also reported some areas which are important to consider to ensure that created partnerships are mutually beneficial. Those included:

- businesses being supported to measure the impact and benefits of the partnership on their organisation (e.g. staff wellbeing)
- businesses being supported to recognise their social value, which will empower them to celebrate it and talk about it
- all support provided is acknowledged and thanked for
- size and type of benefits can be dependent on the size and type of organisations involved in the partnership



- the amount of resources which need to be invested into pitching for and creation of partnerships by both charities and businesses
- 'one size does not fit all' there is no one model which will suit all of the partnerships created
- partners being clear on each other's needs and on the value that they bring into the relationship
- being clear on the commercial viability and relevance of the partnership to allow for a long-term, mutually-beneficial relationship
- there are occasions where interactions with charities are a 'boxticking exercise'
- some organisations will be more likely to be chosen as partners due to their brand and values (e.g. politically neutral).





Businesses pitching to charities they would like to partner up with - this approach would reverse the more traditional approach to business-charity partnerships, potentially allowing both businesses and charities to be clearer on what they might be able to offer and get from a partnership.

Ensuring that the balance of power is considered - all partners should feel empowered to enter a partnership on an even level of power, making them more likely to be open and honest about their needs and offer.

Businesses could provide support in shaping other partnerships - a more creative approach to supporting charity partnerships; based on organisations, who are more experienced in building business partnerships, to support new partnerships.

Matching platform/service/map - a resource which would allow for a meaningful matching between charities and businesses, e.g. based on values.

5



Ensuring sustainability

A lot of funding pots available to charities are short-term funding, often project specific. This creates a sense of insecurity and lack of sustainability within the sector. Attendees were asked to discuss the ways in which, collectively, we could create more long-term funding for the voluntary sector, including:

- practical ways in which businesses and charities could support sustainable funding for charities
- changes to charities (e.g. governance, operational etc.) to enable the suggested changes to be implemented.

The most popular practical way that would support the sustainability of the sector, as reported by the attendees, was a change to the narrative about charities, especially their funding models. It was highlighted that there is insufficient understanding, appreciation and communication of the core costs that charities have to cover. This was underpinned by a mismatch between what charities expected businesses would consider funding and what businesses were prepared to support.

Another practical way of supporting the sustainability of the sector was putting focus on non-financial support that can be provided by the business community. This included skills-share, consultancy and training, e.g. business planning, creating income strands, building pitches.

The third most popular solution put forward by the attendees was creation of a more collective approach to addressing the sustainability of the sector. Groups of charities who share the same vision or businesses who want to support specific causes. By joining forces, organisations would have access to new resources, might be able to access bigger funding pots and benefit from each other's expertise.

Other practical suggestions included:

- building in support to look at the sustainability of a project into the initial funding plan, to ensure longevity past the funding term
- businesses pledging a percentage of their annual surplus to support local communities, which can then be distributed amongst charities
- service/platform matching charities and businesses to create partnerships
- businesses getting involved in specific projects
- supporting long-term projects which build equity over time
- charity discounts on core services provided by businesses
- ensuring that partnerships are not based on a few key individuals, but whole organisations
- providing match funding to unlock grant funding
- charities introducing tiered approach for their business supporters (e.g. The Princes Trust).

Potential challenges highlighted included:

- Long-term partnerships being a barrier to new charities joining the sector
- 2. Support for staff to engage
- 3. Ensuring that the balance of power is equal

Suggested solutions

Attendees provided suggestions of some additional solutions to existing problems surrounding sustainability of the sector.

ISSUE	SOLUTION	DETAILS
Lack of clarity on impact	Support to understand the impact of a partnership	The importance of understanding impact has been highlighted in setting the expectation for a partnership (possibility of impact delivered over a set period of time) and supporting the communication, commitments and value to all partners.
Lack of clarity on value of the partnership	Time spent on clarifying the value brought to all partners and supporting them in understanding it	All partners should be clear on the value that they can bring and support each other in understanding it, thus empowering each other to communicate it, e.g. improvement of social value brought by a business.
Restricted funding	Supporting funders to provide more flexible and capacity-building funding	Organisations should be clear on the opportunities to improve their capacity by including requests/funding capacity-building activities or funds that are reactive to the situation changing.

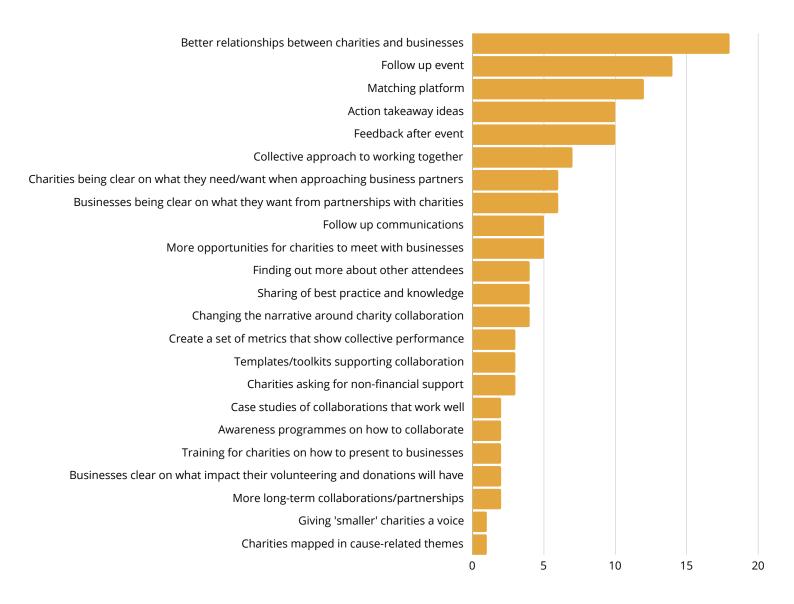
Postcard feedback





1

What would you like to see happen after this event?

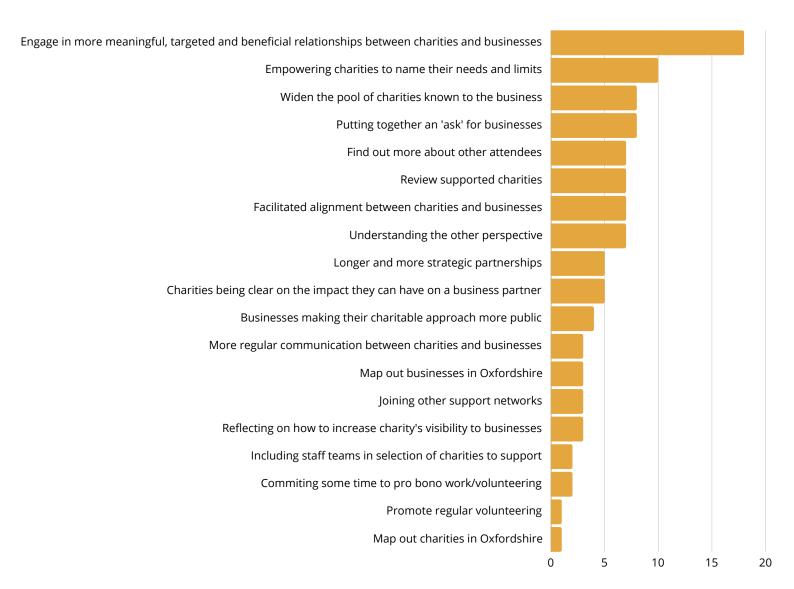


Postcard feedback





The one action I would like to take is...



Common themes

Overall, there is an appetite for more meaningful, mutually beneficial partnerships built between charities and businesses, reflected in the overarching themes highlighted at the event:

- All attendees agreed that there is a need for a change of narrative around those relationships, from a one-sided, give-take arrangement to more longterm, equal and open partnerships, which are built on mutual understanding of organisational needs and the value that partners bring.
- With the limited resources and restricted income, the power of collective action might be more impactful than before. Organisations sharing values and missions can benefit from each other's networks, skills, resources and create opportunities which might be inaccessible to smaller, individual organisations, e.g. grant funding.
- There is a need for support for both charities and businesses to facilitate the creation of new partnerships, from the initial stages of putting together pitches, through business development and upskilling to understanding the joint impact.
- Both businesses and charities have a collective understanding of the possible benefits that come with such partnerships, but it might be beneficial to highlight those and empower all of the partners to understand and own them, e.g. additional social value delivered by a business.
- Longer-term relationships are generally regarded as more beneficial and impactful, creating sustainability and security in the voluntary sector.



Those who contributed to this event are passionate about helping to ensure we are able to develop more creative, effective, mutually beneficial and impactful cross-sector collaborations.

Each in their own way continues to help achieve this through their individual work and voluntary activities. However, we are even more ambitious about the outputs, learnings and ideas from the Oxfordshire Engage event and this report. We would like for it to be a catalyst for others to embrace and develop solutions within existing and new programmes and projects across Oxfordshire. We hope that it will:

- Facilitate connections with existing resources and models of support, of which there are many
- Inspire the development of new models, collaborations and partnerships
- Support in attracting funding and commercial offerings, supported across all sectors, which demonstrate significant return on investment, given the context set out at the beginning of this report.

The Oxfordshire Engage committee firmly believes this county has exceptional people and organisations and is well positioned to take these learnings and evidence to continue building innovative and impactful support solutions.

Thank you to all of the attendees who provided their invaluable feedback



Acknowledgements

Thank you to the Oxfordshire Engage committee: **Naomi Stewart Hale**, **Caroline O'Connor**, **James Craddock**, **Hamish Law**, **Cathy Dunbabin**, **Grant Hayward**, **Kate Parrinder**, **Paul Mabbutt**, **Richard Rosser** and **Sonia Kearns**.

Thank you to the sponsors: **Get Radio, Aston and James** and **Leonardo Royal Hotels Oxford**.