

A TOOLKIT FOR CORPORATE & COMMUNITY FOUNDATION PARTNERSHIPS



October 2020

To our Community Foundation colleagues across Canada:

Since our inception in 1957, Green Shield Canada (GSC) has prioritized investment in our communities. Rooted in our structure as a not-for-profit social enterprise, we have made significant contributions through a mix of charitable giving, sponsorships, volunteering, employee engagement, impact investing and other corporate initiatives.

While there was no doubt that we were having a positive impact through community granting, we continued to challenge ourselves on whether this was most effective and efficient approach to managing our social impact. A number of options were explored and in 2018 a decision was made to develop a new and innovative community granting model, in partnership with Hamilton Community Foundation and Community Foundations across the country, built on a platform of shared values and the belief that we could make a greater impact by leveraging these partnerships rather than going it alone. Key to this model is ongoing evaluation of both the granting projects and our partnerships with Community Foundations.

In May 2018, to mark our 60th anniversary, we launched our Six 4 Six program with a \$6M investment across six communities (Halifax, Hamilton, Windsor Essex, Calgary, Vancouver/Victoria, and Sault Ste. Marie). Together, we have built what we believe to be a new and powerful model of how businesses can work together with Community Foundations to make significant, long-term positive impact in their communities. As our experience and learning has evolved, we have more deliberately identified the components that make this model effective and maximize our granting impact, like evaluation and impact measurement. A diagram of the partnership model is included as Appendix A, and we believe that it could be effective for communities and businesses across the country – tailoring the approach to meet your unique context.

We are pleased to share what we have learned in the form of this toolkit – a resource that we hope will be useful as you design and implement your strategy. Knowledge sharing and collaboration are central tenets in the vision of this partnership and how we can improve the lives of Canadians.

We invite you to use the enclosed material in whatever way is most helpful and to add to our shared learning as we continue to work together for the betterment of our communities.

Sincerely,



Zahid Salman
President & CEO



Mila Lucio
EVP, Human Resources & Social Impact

CORPORATE AND COMMUNITY FOUNDATION PARTNERSHIPS

CO-CREATING A NEW MODEL OF CORPORATE COMMUNITY INVESTMENT

Most charities and Community Foundations – whatever their size or location in Canada – have relationships with businesses. These relationships take a variety of forms, for example: sponsorship support, volunteer contributions as board or committee members, and sitting together at tables focused on addressing key local issues to name just a few. Similarly, businesses look to local charities to provide meaningful opportunities for employee engagement.

Green Shield Canada is one of these businesses. We have a long history of significant investment in communities across the country through a large granting program, sponsorships, volunteering and other corporate community investment initiatives. As a company that continuously focuses on increasing our effectiveness and impact, however, we questioned whether we were having the maximum impact possible. Further, we wondered how we could deepen our impact in two particular areas that aligned with our business expertise and strategic goals: oral and mental health.

Having learned about Community Foundations through a relationship developed with Hamilton Community Foundation over a number of years, we came to the conclusion that building a partnership with local Community Foundations and co-designing a new model of corporate community investment could both deepen our impact and advance our goals. Simply, the following premise was proposed:

If our business' assets and investments are combined with the Community Foundations' local knowledge, relationships and granting expertise then our investments will make a stronger more positive change in a particular focus area.

The result was the creation of Six 4 Six – an initiative we launched in May 2018 in honour of our 60th anniversary. This involved an investment totalling \$6 million in six sites across the country, and working with local Community Foundations and Hamilton Community Foundation to design, implement and evaluate a new model of corporate community investment. Much has been learned since this initial launch.



In the spirit of collaboration and learning, this toolkit has been developed for the purpose of sharing the work and learning by Green Shield Canada and five Community Foundations across Canada (Victoria, Calgary, Windsor Essex, Hamilton, and Nova Scotia) to develop and implement a new model of corporate community investment built on a partnership between businesses and Community Foundations. This model is collaborative, anchored by an alignment of values and objectives of the partners, and drawing on the strength of the unique assets of each.

THE TOOLKIT

This toolkit has been designed for use primarily by Community Foundations. We believe that the process can be useful to foundations of all sizes. The toolkit is divided into five sections, taking the user through a process from consideration to implementation.

The five sections are:

1. Deciding what “corporate partnership” means for you
2. Initiating corporate relationships
3. Building your base
4. Working together
5. Taking it to the next level

Further, within each section we have inserted the following icons to help you find more specific pieces of information:



The tools



An example



For you to consider

The toolkit concludes with some thoughts on potential emerging roles for Community Foundations.

We hope that this is a useful toolkit and encourage you to add to it based on your own experience.

1. Deciding what “corporate partnership” means for you

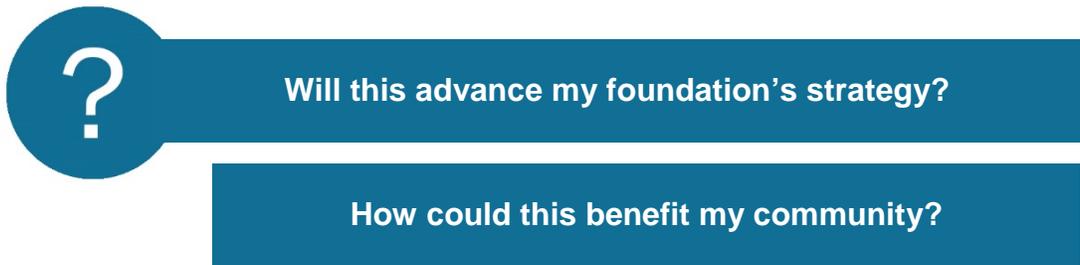
Developing trusting and collaborative relationships can yield many benefits – but it does take time. Taking time up front to consider how this will advance your foundation’s strategy and impact is important – considering if this is where your resources of time and energy are best directed.

On the “pro” side, being able to articulate and demonstrate the “value-add” of a Community Foundation in this time of multiple, competing charitable asks is important. We believe that this model of corporate community investment partnership can help you do this.

You may already have existing corporate relationships that you would like to deepen. Or, you may see opportunities in your community that haven’t been initiated to date and this model provides the strategy to do so.

Starting small – perhaps with one or two medium sized local businesses - could help your Community Foundation build a critical mass that will attract others.

Similarly, if you see a larger corporation that has roots in communities in addition to yours, this model provides a framework for working with other Community Foundations to create a vehicle to address a corporation’s desire for a national strategy and impact.



? Will this advance my foundation’s strategy?

How could this benefit my community?

2. Initiating corporate relationships

What are the vision and values of your Community Foundation?

Alignment is the key word. Which businesses in your community share a common set of values and goals with you?

Consider the following:



Who can we build relationships with?

Are there businesses that...

- **Have deep roots and long-term commitment to your community?**
- **Have a direct connection to a priority need in your city?**

For example, one of Hamilton's largest employers is the steel industry. Many of these businesses are located in the north end of the city that is also home to our most economically challenged citizens and a large number of young people who currently don't complete high school or attend post secondary. These businesses have jobs available and need skilled employees. In addition to a potential business benefit, some will identify a social responsibility to supporting programs and services that will increase the number of young people graduating, pursuing careers in the STEM area and staying in Hamilton. A clear alignment exists between the corporation's interests and local priorities related to poverty reduction and education identified by the Community Foundation.

- **Are in alignment with your Community Foundation and with which you have an existing relationship?**

For example, someone from a company's management sits on your board or is a donor. This may provide an opening for exploring further collaboration.

- **Have a passion for your community?**

There may also be a number of small businesses in your community, powered by energetic entrepreneurs who have little spare cash but rather a passion and commitment to your community and its people. Once again, examining whether there is an alignment between their interests and issues identified by the Community Foundation or through Vital Signs and such, is a starting point.

What can you learn about the businesses you identified? For example:

- How have they supported the community in the past through corporate sponsorships, donations, volunteer time and such?
- Similarly, is the owner or senior staff an active contributor to their community?
- What are the company's business goals and strategies?

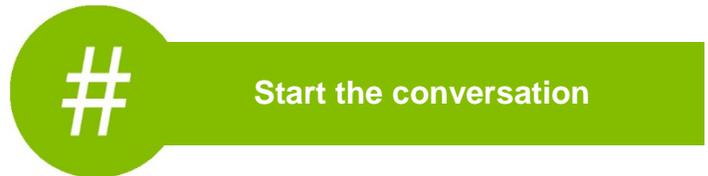
Do some research



- Do these align with any community needs? (eg: A construction company and need for affordable housing; a grocer or restaurant and food security; financial institutions and financial literacy, and so on.)
- How does the company position themselves on social media and advertising?
- Compare your Vital Signs report or other research you have gathered about the community, and the company's sustainability report or community support pages on their website.

The next step is to start the conversation.

Learn more about each other. Tease out “issues” of common interest as well as what each of you (the business and Community Foundation) have to bring to a potential collaborative strategy. Such conversations are key tools to building relationships that are critical to the success of the model of corporate community investment proposed in this toolkit. It won't happen in one meeting - as with all relationships, building mutual understanding and trust takes time. Sometimes finding a small opportunity to do something together early in the process is helpful.



Green Shield Canada had a long history of investing in communities across Canada. We had undertaken extensive research to understand the barriers and impact of access to oral health on Canadians, and used this to assess and fund grants.

What we lacked, however, was the local knowledge and relationships. In addition, we did not view grants administration as part of our core business. As a result, we were uncertain whether our significant investments were addressing priorities, having the most impact possible and were sustainable. Further, we believed that there was potential for additional leverage and profile from their investment that would benefit both the community and the corporation. The decision to partner with Community Foundations did not happen overnight! Rather, it was the result of a longer relationship development process.

3. Building your base

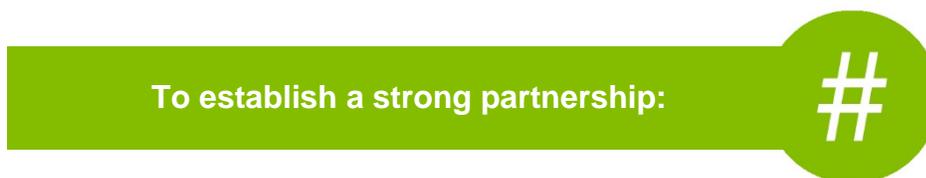
This phase is likely the one that historically has received less attention or been skipped altogether.

While to some it may feel like “too much process”, our experience is that the understanding and agreements reached during this phase are **absolutely essential** for the establishment of enduring trust that will enable the innovation and process in the future.

We know that sectors, as well as individuals, have different definitions, norms, expectations and benchmarks – while often using the same words. Even if it seems repetitive, agreeing on the definitions of the words used around values and expected outcomes is necessary and should never be skipped. This affects how relationships are built and function, how success is defined, how power, control and decisions are managed, how failure is accepted and dealt with and a myriad of other key things. A good facilitator can be helpful in these discussions, as well as a note taker who can capture important discussions and decisions.

Not everything will be discussed and determined at the beginning – it is a continuous learning process and thus important to ensure that there are opportunities built in as time progresses to continue these discussions.

This also needs to be an on-going conversation to check-in with the partners to ensure values are still aligned and that open and transparent communication around decision making continues to happen. The strength of the partnership is often where initiatives succeed or fail.



On a practical level, consider completing the following checklist...

Each partner to share their top 5 values.

Once all the values are shared, it will be critical to ensure that there are common definitions used. Get really clear on what is important to each partner. Even if you feel like you are going over the same information, ensuring alignment on these foundations is valuable over time.

Each partner to share what success looks like to them.

Try to be clear about each partner's expectations.

- **Each partner to share desired impact or change they would like to see.**
 - Determine what data is available currently on the issue you are looking to change. This will provide a baseline to see if the partnership will actually accelerate the change.
 - Draw upon local research, conversations with key community stakeholders, Vital Signs reports, and input from grantees as key sources of information
 - Talk about what measures you will use to determine impact

- **Establish a good governance model for oversight, strategy development and decision making.**
 - Determine who from each organization will provide oversight as you develop your approach
 - Ensure that discussions and decisions are captured in order that they can be referred to over time
 - Focus on maintaining good open communication, identifying and discussing issues as they arise

- **Set-up timelines that are realistic and feasible to start the initiative and to begin to see expected outcomes.**

- **Identify what resources and assets each partner is bringing.**

As Community Foundations, we have both tangible and intangible assets and can play a number of key roles that will be valuable to a business. Consider, for example, assets such as:

 - Reputation and trust in the community
 - Knowledge of service providers
 - Understanding of local issues and priorities
 - Expertise in grant making

4. Working together

The previous steps will shape your shared decisions about the “what” and the “how” of what you are going to do together.

Begin with articulating your shared vision. In the work undertaken by Green Shield Canada, our overarching vision was to improve access to oral health and mental health for Canadians.

The “how” began with a granting strategy. This is where the resources of both the corporation and the Community Foundation are brought together.

Consider, for example...

The Community Foundation has:

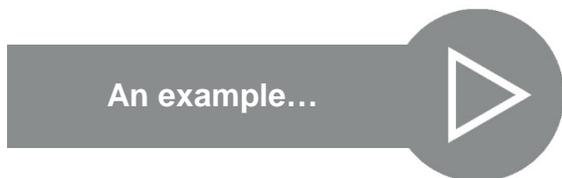
- A network of relationships with individuals and organizations in the community who can help inform the issue and the strategy
- Grant making expertise: administration, proposal solicitation, review and due diligence
- The vehicles to connect local stories and impact across the country
- Respect as a leader within their field



In addition, Green Shield Canada has:

- A network of relationships and individuals within the private sector as well as community spheres
- Research data and expertise related to the issue
- Dollars to invest
- Specialized staff and other partners in the areas of communication, oral and mental health
- Respect as a leader within their field
- A national profile and voice on relevant issues

As active collaborators it is critical to discuss how each of these assets will be used – developing a work plan with clear actions, responsibilities, and time lines. Clarity as to how decisions will be made, and how risks will be identified and addressed is important. A small oversight or governance group is recommended, as are strategies to communicate within each organization as well as across. Continuous learning and flexibility are key as your work together evolves.



It follows, from the above, that evaluation needs to include a focus on the partnership as well as on the objectives of the initiative. For the Six 4 Six Initiative, the partnership was evaluated on the following areas:

- **Partnership Principles:** This checks in on the values and principles that started the initiative and partnership. As people in organizations change, it is good to ensure (on an annual basis) that everyone is on the same page.
- **Partnership Foundations:** This reviews the processes and governance to ensure misunderstandings are dealt with on a timely basis. Trust is essential in any partnership.
- **Partnership Outcomes:** This gets to the acceleration and amplification of the impact hoped for on the issue the initiative is focused on. Knowing what the baseline for the issue is in your community is key. Many want to “move the needle” but are unsure where it is. The more you know about the current situation, the better, similarly, the clearer you can be on hoped for outcomes the better. Those can be tangible indicators such as number of people in need or number of programs. The indicators can also be on a more connected sector so understanding how the community is currently working together and if the collaboration or effective relationships are deepening.



5. Taking it to the next level

When two entities such as a Community Foundation and a corporation come together with a shared vision, passion and commitment, the possibilities are numerous and exciting. Trust creates a foundation upon which to try new things, add to what the other is doing, and genuinely engage in a process of continuous learning.

Opportunities to “take it to the next level” can be very concrete. For example, in Windsor, where Green Shield Canada was founded, we chose to invest in an endowed administration fund for the Community Foundation as well as directing funds towards community grants. In this way, others will see the leadership of Green Shield Canada and how they are building the community investment capacity of the community – forever – through this gift. The Community Foundation can tell this story and strive to inspire others in following the same path.

Another example can be found in the amplification that resulted when the Windsor Essex Community Foundation used their Vital Conversations strategy as a means for helping to shape a granting strategy focused on oral health. Observing how Vital Signs research, Conversations, and dissemination can serve to profile an issue highlights the potential of this vehicle as a Community Foundation to assist Green Shield Canada in achieving our broader vision of access to oral health for all Canadians. Understanding the local context is so critical that GSC has now formally included completion of an environmental scan as an early step in developing GSC/CF partnerships. Such information can inform the local granting strategy, raise public awareness and support efforts to advocate for system change and also help assess impact and change over time.

How can we take it to the next level?



Opportunities to “take it to the next level” can also emerge in unexpected ways.

Once again, Six 4 Six provides an excellent example. In early discussions, Green Shield Canada indicated that we had a desire to support a community where currently no Community Foundation existed. Rather than abandoning this wish and moving to another city, we instead began to explore how we might contribute to the community’s philanthropic capacity in a much more significant way – by supporting the establishment of a Community Foundation. We took guidance and began a respectful and thorough process to first explore the interest and feasibility, and then supported the creation and establishment of the Algoma Community Foundation.

An example...



This process evolved over a two-year period and included the following steps:

1. Engaging the support of Community Foundations of Canada.
2. Community consultation and readiness before confirming corporate support.

3. Supporting local leadership in building a Community Foundation model that works for the area.
4. Financing start up costs.
5. Allocating financial investment to provide administrative support, grant-making and establishment of initial endowments, and leveraging the investment by Green Shield Canada to inspire others in the community.
6. Facilitating mentoring and knowledge sharing between the new and established CFs.
7. Celebrating and profiling the new CF together in a strategic launch event.

THE UNIQUE “VALUE-ADD” OF THE COMMUNITY FOUNDATION

The Community Foundation’s mix of expertise and roles can add significant and unique value to a business’ corporate giving strategy. A number of examples have been identified even in the early stage of evaluation the new corporate community investment model developed and tested through Six4Six and subsequent partnerships. Examples are provided below:

- **The power of convening in shaping strategy:**

When Calgary Foundation brought together mental health stakeholders a need to better support refugees and newcomers was clearly identified. Convening provided an opportunity for participants to discuss limitations of the current approaches and how a new model would be both more effective and sustainable. From this emerged a proposal and proactive grant with GSC funds to address a community priority.



- **Staging granting to enable and model testing and scaling:** Victoria Foundation has many pre-existing relationships within the mental health field. Building on these, they identified two pilot projects for proactive funding with the intent that additional grants will be provided to scale and sustain these models based on what is learned and early impact.
- **Mixing proactive and responsive granting:** The Nova Scotia Community Foundation was new to running a granting round of this size. Seeking advice from Community Foundation peers, they began by assessing their local community’s unique context related to both oral and mental health with the result that a two-pronged approach two granting was initiated. Capacity building funding from Green Shield Canada was used to support the convening of local mental health providers. The discussion and report that resulted were pivotal to both promoting more collaboration and connection between service providers as well as informing the call for proposals that the foundation subsequently issued. In the case of Oral Health, the Foundation approached the Dalhousie University Dental Faculty and requested that they consider a new community partnership that would improve access to their services for people with mental health challenges. A proposal from Dalhousie and a local mental health organization was subsequently jointly submitted and funded through a GSC grant.

A FINAL THOUGHT: EMERGING ROLES FOR COMMUNITY FOUNDATIONS

Whether they are working with individual donors, their families or businesses, Community Foundations stand in a unique position in our communities as a philanthropic resource.

They listen to and understand what donors are seeking to achieve through their philanthropy. Similarly, they listen to understand the advice offered by those most closely connected to issues and experiences, as well as the findings from research and other jurisdictions. GSC chose to partner with Community Foundations across the country because of these attributes.

While early indicators are positive, we believe that the full potential and impact of this collaborative model of community investment will be revealed over time. Already the partnership GSC has with Community Foundations across the country enabled the company to act quickly and confidently in distributing emergency funds related to the Covid-19 crisis. As we continue to build the network of Community Foundations engaged in this partnership, the opportunity for innovation leading to significant and sustained impact is growing. We look forward to shaping this future together.

GSC/CF CORPORATE PARTNERSHIP MODEL

Creating significant, measurable social impact by improving health & well-being in the communities where we live and work

