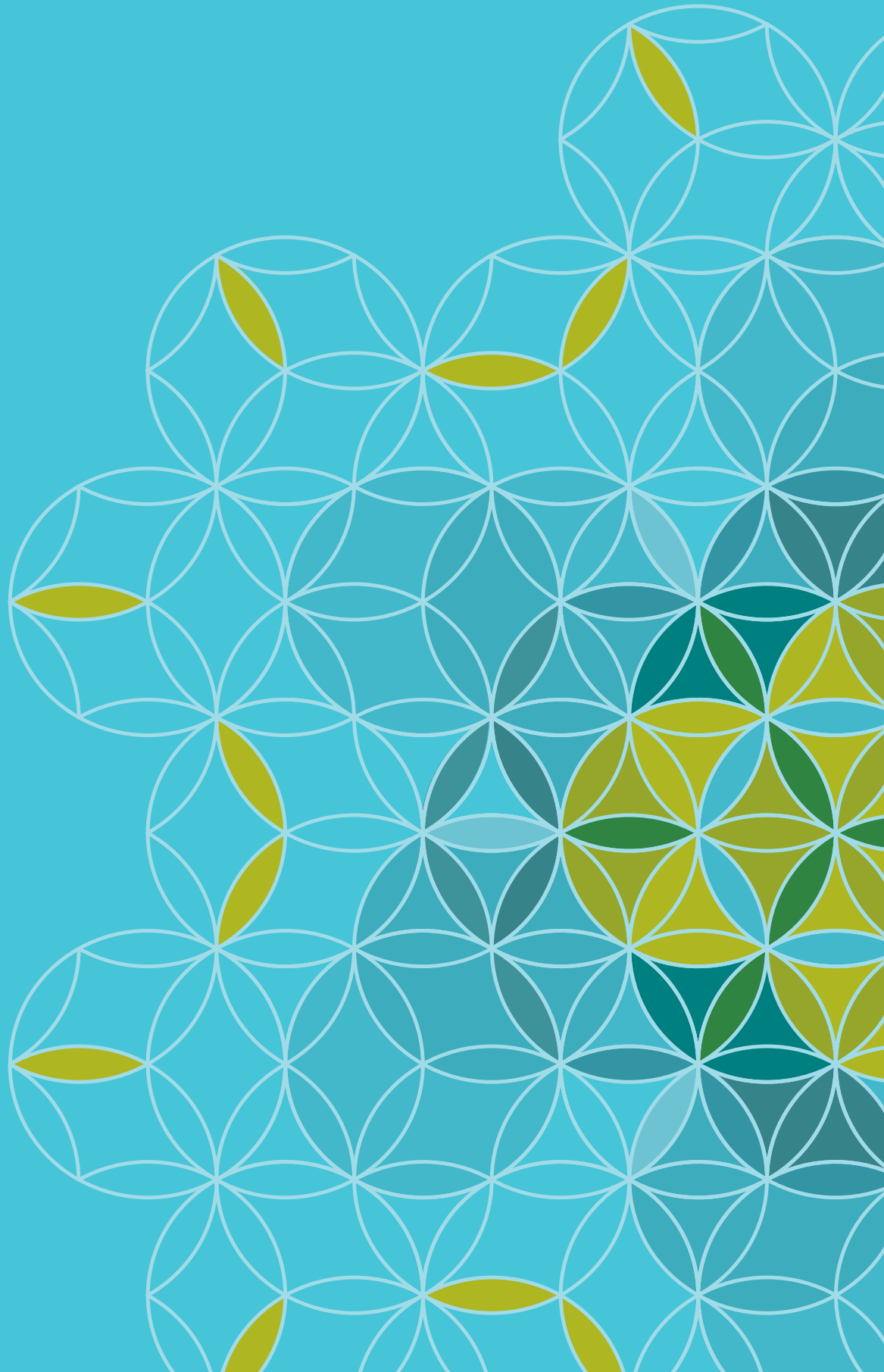


# Community Sector and Business Partnerships Tool Kit



Forming strategic relationships between business and not-for-profit (NFP) community organisations can not only build community sector capacity, but develop mutually-beneficial outcomes for business and the community. There is evidence of a change in the nature of relationships between NFP organisations and business, with a move away from business only being concerned with their economic and reputational drivers and NFP organisations only being focused on social issues.

In part this changed perception may be due to changes in the economic, social and political landscape to which community organisations and businesses have been required to respond. Whatever the reason, there is a realisation that these relationships have the potential to benefit all concerned.

### **Purpose of this Tool Kit**

This tool kit has been produced to provide a logical step-by-step process for building and maintaining relationships between business and NFP organisations.

It provides practical tools, templates and links to other useful resources available on the Internet. Community organisations may not find it necessary to do all the activities referenced in this tool kit – just select those activities you find helpful.

This resource may be downloaded from the Office for the Community Sector website [www.dpcd.vic.gov.au/communitydevelopment/community-sector](http://www.dpcd.vic.gov.au/communitydevelopment/community-sector)

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# Guide at a Glance

This guide comprises a framework incorporating a six-stage approach to relationship building.

## Is this Relationship for You?

First look at your organisation:

- What do you need: funding, links, mentors, volunteers?
- Why do you need/want a relationship?
- What will it help you achieve that you otherwise wouldn't?
- What capacity do you have to embark on a relationship?
- Have you contacted organisations who have already done this?
- What would it take to put this into an action plan?
- If you think a relationship is for you go to stage 1.

Stages	Tools & activities	Resources
1 Getting Ready: understand your organisation	<ul style="list-style-type: none"> <li>- Checklist of questions to ask own organisation</li> <li>- Create a Strategic and Business Plan</li> <li>- Create a CSR/ Community investment Strategy</li> </ul>	Maribyrnong City Council; Our Community; Australian Business Arts Foundation; New South Wales Council of Social Service; Business Leaders Forum; VicHealth;
2 Finding a Partner/ Relationship	<ul style="list-style-type: none"> <li>- Mud Map of potential relationships</li> <li>- Research Template</li> </ul>	Maribyrnong City Council; Our Community; Australian Institute for Corporate Responsibility; Australian Business Arts Foundation; National Australia Bank; Office for the Community Sector; Business Victoria; World Health Organisation; VicHealth; Department of Families, Housing, Community Service and Indigenous Affairs
3 Approaching a Potential Partner	<ul style="list-style-type: none"> <li>- Develop an Elevator Speech</li> <li>- Pitch document</li> <li>- Proposal Template</li> </ul>	The R.E. Ross Trust: Social Compass and Transfield Services.
4 Establishing the Relationship	<ul style="list-style-type: none"> <li>- Plan on a page</li> <li>- Draft MOU</li> <li>- Risk Management</li> </ul>	New South Wales Council of Social Service; Department of Education and Early Childhood Development; Public Interest Law Clearing House; World Health Organization; Leadership Victoria; Good Company; Volunteering Victoria;
5 Keeping it on Track	<ul style="list-style-type: none"> <li>- Communication Plan</li> </ul>	The World Health Organization; VicHealth
6 Review/ Renew/ Next Steps	<ul style="list-style-type: none"> <li>- Review/ Renew/ Exit Checklist</li> </ul>	Our Community; Australian Business Arts Foundation

## Stories from the field

Portico on Sturt  
 The Smith Family and IBM Ballarat  
 Football Federation Victoria and Various Partners

SecondBite and Coles  
 Travellers Aid and V/Line  
 Prahran Mission and AMCOR

# 1. Getting Ready

The following checklist will help community NFPs and businesses evaluate their individual organisations by pointing out the things you should look at and consider before commencing a partnership. It can be a valuable tool and makes it easier to delegate tasks to people in your organisation.

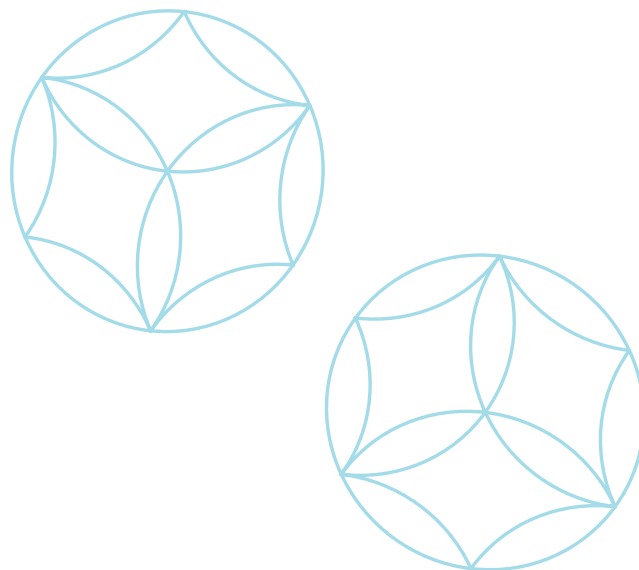
The template can assist you in gathering information that is, or could be, used in developing a variety of documents, for example strategic plan, business plan, proposal, and is not limited to compiling information for discussions with potential partnership organisations.

This information will also assist you in having clear, open and honest discussions.

Where information is unavailable (ie if you have answered 'No' in the template, we have provided a point of referral.)

Remember embarking on a community/business partnership is a big step for any organisation and having this information available will enable you to have informed discussions with potential partnership organisations.

**Note:** The templates in this tool kit are a guide only and can be amended to suit your particular organisation and circumstances.



# Tool 1: Getting Ready Checklist

The information gathered for the Getting Ready Checklist can also be used to develop a business case and/or business plan.

Category	Question Guide	Information Available				Action/ Comment
		Yes	No	Information Required	Whose Responsibility	
<b>Who are you?</b>	What is the legal structure of the organisation for example, Entity Type, Tax Status.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Check your organisation's legal structure – Refer to ABN Look Up. <sup>1</sup>
	What is the history of the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Do you have a mission and/or vision statement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		If no, refer to the Strategic Plan Template.
	What are the purpose and/or values of the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Where are you based?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Where do you operate/ what is your market?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Do you have business plans?</b>	Do you have a Strategic Plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		If no, refer to the Strategic Plan Template.
	Do you have a Business Plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		If no, refer to – Business Plan Template. <sup>2</sup>
	Do you have a Communications Plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		If no, then refer to the Relationship Communications Checklist.
	Are you aware of where the organisation is now and where you would like it to be?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		If no, refer to the Strategic Plan Template.
<b>What do you do?</b>	What are the services and/or products you provide?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	What do you want/need from a relationship?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

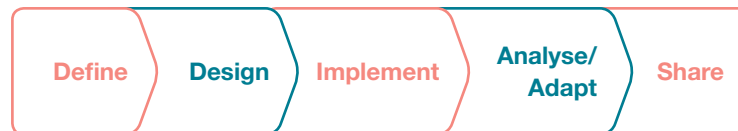
1. ABR Look Up [www.abr.business.gov.au](http://www.abr.business.gov.au)

2. Increase Your Chance of Success with a Business Plan – Business Plan Template [www.business.vic.gov.au/BUSVIC/STANDARD/PC\\_62526.html?s\\_kwid=TC|8836|business%20plan%20template|S|e|7976156812&gclid=CPKtp-H\\_obACFU1spAodyywuWg](http://www.business.vic.gov.au/BUSVIC/STANDARD/PC_62526.html?s_kwid=TC|8836|business%20plan%20template|S|e|7976156812&gclid=CPKtp-H_obACFU1spAodyywuWg)

Category	Question Guide	Information Available			Whose Responsibility	Action/Comment
		Yes	No	Information Required		
<b>What are you trying to achieve?</b>	What do you want to achieve in the short and long-term?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>What do you have to offer to a partner?</b>	Skills, knowledge, influence, reputation etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Are you offering a specific project, fundraising event or require sponsorship?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	When are you looking for a partner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Promotion and increased profile of the organisation, increased business, increased staff morale, goodwill etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Who currently supports the organisation?</b>	Do you receive government funding?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Do you have current sponsors/funders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Do you have shareholders/stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>What is the capacity and capability of your organisation?</b>	What is the role of the board?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Do you have staff to achieve the desired outcomes and reporting requirements?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Who is/will be the person responsible for the relationship?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Refer to start of checklist.
	Will this be conducted by an employee/or board member?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Will this be conducted by a volunteer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Who would be on a steering committee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Would there be an opportunity to market and refer business?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Do you have the necessary tools and equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

# Strategic Planning Pointers

A strategic plan describes the context or situation in which your organisation operates, sets the organisation's goals and directions, and guides the allocation of financial and human resources to achieve those goals.



Your strategic plan should include clear and concise information regarding the following core components:

- Executive Summary
- Purpose (also known as mission or vision)
- Context (your history, internal and external environment, stakeholders, markets and competition) – Where are you now?
- Goals – Where do you want to be?
- Key Performance Indicators (KPIs)
- Strategies
- Program of Activities
- Marketing/Engagement Plan
- Financial Plan (including Budget), and
- Management (Organisational Structure, Governance, Succession Plan, and Risk Management).

## Format

The following is a simple, but effective planning format that will fit many of the sections of your strategic plan. The format is not rigid and should be adapted to the requirements of individual sections as applicable. The four sub-sections recommended are:

### Current Situation

Clearly and concisely present the current situation with any contributing history and any trends, cycles, changes or future developments that are relevant.

### Key Issues

Clearly define the most urgent and important issues as they relate to the current situation for this section, and the overall purpose of this plan and the organisation's mission. Key issues are usually those strengths, weaknesses, opportunities, threats, capability gaps and impediments that impact on business performance.

### Strategies to Address the Key Issues

Formulate strategies using the SMAAART acronym to address the key issues. SMAAART – Specific, Measurable, Action-orientated, Achievable, Affordable, Relevant and Time-bound.

### Key Performance Measures and Targets

Establish key performance measures/indicators, performance targets and timelines

## Five Simple Tests for a Good Strategic Plan

### Comprehension

- Am I satisfied that all readers of this plan will clearly understand it?

### Appropriateness

Am I satisfied that the strategic/business directions proposed are aligned with the organisation's constitution?



## **Sustainability**

- Am I satisfied that the strategic directions proposed are of a nature and quality that should ensure the future of the organisation?

## **Feasibility**

Am I satisfied that:

- All company implications of the strategic/business directions proposed have been considered thoroughly?
- Implementation is possible?
- All supporting goals, objectives and strategies are realistic, practically achievable, affordable and comprehensive?

## **Accountability**

Am I satisfied that:

- Management accountability is clearly defined?
- Management is adequately resourced and well prepared to implement this plan?
- Effective remedial action has been planned in the event a management shortcoming occurs with plan implementation?

## **Developing Your Strategic Plan**

This template outlines the core components and includes suggested formats for a strategic plan.

A guide to writing the strategic plan:

- Clearly identify the audience.

- Remember that this plan is a working document that has the clear purpose of initiating focused action and generating clear and measurable results. Avoid the excessive use of adjectives to over-sell the plan. Highly descriptive language can cloud key issues, blur the plan's focus and slow and/or confuse its implementation.
- Keep the plan 'tight'; ensure it remains concise, balanced, clear and logical. Use quantitative rather than qualitative information. Avoid critical dependencies on one source of information.
- Focus on facts and information from credible and reputable sources.
- Adapting your strategic plan:
  - It is important to update all the sections of your strategic plan regularly, to make sure your plan is in line with your revised actions. Document the reasons behind changes to ensure what you have learned to improve the effectiveness and efficiency of your organisation. Adaptation should be viewed positively as a strategic response to new information.
- When adapting your strategic plan consider:
  - Importance/benefit of the change
  - Size of the change required (extent of activities that need to change)
  - Strength of evidence for change
  - Stakeholders and their likely response
  - Costs of change (time, cash and attention that would otherwise be allocated to implementation)

# Tool 2: Strategic Plan Template

Organisation Name	
Strategic Plan	
Period: from	Period: to

## 1. Executive summary

The executive summary is the **last section to be developed**. It should be restricted to two pages in length. In essence the executive summary is a very effective distillation of the overall strategic plan into a ‘hard hitting’ summary of key performance initiatives and performance targets. Typically it would include the following:

- What is the opportunity?  
Who will benefit?
- The Product
- The Market Strategy
- The Management Team
- Profit and Cash Projections
- Investment Needs
- Returns to Investors

## 2. Purpose

This is usually a single, inspirational and challenging statement (also known as vision/mission) that sums up why your organisation exists, expressing the beliefs and principles that underpin it. The purpose does not need to be achievable within the duration of the strategic plan. However, it should be faithful to the objects outlined in your organisation’s constitution.

**Vision** = a short statement that tells the overall ideal situation for your organisation.

**Mission** = a statement clarifying the role of your organisation in achieving the above vision.

## 3. Context

This section will summarise the strategic issues facing the organisation having assessed the internal and external environment to identify the organisation’s strengths and weaknesses, opportunities and challenges. It is a distillation of analysis and research undertaken by your organisation.

### History

This should be a brief overview of about three paragraphs summarising when your organisation was set up, for what reason, and the impact of significant achievements, events and milestones that your organisation instigated or reacted to over the years. This should show at least two years of activity, and highlight key achievements.

### Internal Situation

This should be a short but comprehensive evaluation of your organisation. It should cover any major structural strengths and weaknesses, reputation and include an analysis of your organisation’s current financial situation (including details of annual income and expenditure, current levels of assets and liabilities and an assessment of any existing financial risks). It could include a couple of stories of real impacts you have made over the last few years.

## External Situation

This may be one to two paragraphs on your external situation as it is now – concentrating on positive opportunities while remembering potential threats. Consider who are your local, national and international peers against whom you benchmark your organisation? Who are your stakeholders? Are there any other organisations working in the same area in your region? (Keep in mind opportunities for collaboration). How much potential is there for the project to expand?

This section also articulates the key trends and issues about the environment in which your organisation exists – now and in the immediate future. This could include any social, technical, environmental, economic, political, legal, or sector trends, which may affect the direction that your organisation chooses to take (e.g. impact of online communities and interactive web technologies).

## Markets/Stakeholders

A market/stakeholder group is any broad collection of people who might have an interest in exchanging something, coming into contact with or wishing to engage with your organisation. These may include program participants, clients, referrals, members, volunteers, funding bodies, media, sponsors and philanthropists.

### *Define your current markets/ stakeholders*

This should be based on any research or facts. Describe your market/ stakeholders in terms of the key common factors that bind each group (for example youth, community members, funding bodies). What other markets are strategically important to you? If you have segmented your markets, a summary of your analysis should be here.

### *Clarify what you offer your markets/stakeholders*

To encourage regular engagement with your organisation, people need to feel welcomed and benefit from their experience of your organisation. Your particular environment and internal strengths must be exploited to give your markets/stakeholders an experience, service or an object that they feel nothing else can offer. Pinpoint the experience that your organisation offers and how it is unique from your markets' /stakeholders' perspective (i.e. the emotional, physical, social benefits and value you deliver to them).

## 4. Goals and key performance indicators (KPIs)

Your goals should describe what you would like your organisation to be achieving within a given timeframe and demonstrate progress towards your purpose. The plan will usually have no more than six goals and each should consist of one specific, clear and tangible objective. The goals should be explicit and implicitly relate to both the purpose and your organisation's constitutional objectives. The goals should also be defensible against your analysis of your internal and external situation as described in the Context section.

KPIs are used to demonstrate how well your organisation is progressing towards achieving its goals. An effective KPI is specific, measurable, achievable, important and controllable by your organisation. Each goal can have as few as one KPI or more as in *Figure 1*.

**Figure 1: Goal and KPI Set**

Goal	KPI	Annual Targets			
		Current Situation	Yr1	Yr2	Yr3

## 5. Strategies

Strategies are the major initiatives you will undertake to achieve the goals. In one page you can show that your strategies can fulfil one or many goals (see *Figure 2*). The strategies that can satisfy many goals should have a higher priority for you.

**Figure 2: Suggested format for Goals and Strategies Matrix**

Strategies	Goals		
		Increase public profile of our organisation	More people experience and understand the values of our organisation
	How strategies will achieve/contribute to goal		

*Figure 3* outlines strategies in a simple table format with columns for:

- Priority: which strategies you will focus on, have the most impact or provide the most resources
- Measures and milestones: timetable for delivery
- Responsibility: what position in your organisation is responsible for ensuring this happens.

**Figure 3: Suggested Format for Strategies**

Strategy	Key Activities	Priority	Measures & Milestones	Responsibility

**Action Plans**

Each of the strategies should be attached to a specific project or action plan. These action plans are not included in the strategic plan, but are there for your organisation’s and Board’s reference. Each action plan should be detailed. It should clearly indicate what needs to happen by when and by whom for the strategy to be achieved. There will most often be multiple actions with accompanying target dates and different persons responsible for each action.

**6. Program of activities**

This describes your general program of activities – service delivery, special projects, workshops, community events, campaigns etc. Start with a paragraph outlining what you expect to achieve annually, what impact, why it is an improvement on previous years (if appropriate) and then provide a summary of your overall program. Include:

- a statement about the rationale of the program
- an overview of the program for each year of the strategic plan
- ways to measure success, including a model for self-evaluation (e.g. customer feedback, sample surveys, quality assurance tools).

**7. Marketing/ engagement plan**

Provide a plan of the marketing goals and strategies/community engagement that you intend to use to achieve your KPIs. Consider including all your markets/stakeholders, such as: specific communities, sponsors, media, peers, funding bodies and philanthropists. Your plan should flow logically and should demonstrate:

- an understanding of target markets/ stakeholders (current and potential)
- the ability to respond to markets and stakeholders
- evidence of market research
- the ability of your organisation to show leadership.

**Core Elements**

- *Brand Statement*

What is it your organisation offers people? Why do they come to you? Define what participants/clients ‘get’ from experiencing what your organisation delivers?

This is how your creative vision translates into something to offer people that no-one else can offer. This is the reason why certain types of people are attracted to your organisation. It should be a simple statement saying what it is you give to customers/participants/members from their point of view – that is, in terms of the emotional, physical, social benefits and value you deliver to them. For example a social benefit may be the opportunity for community members to work together and share their skills or an emotional benefit may be a sense of connection to Indigenous language and culture through song.

The shorter and simpler the statement the better.

- *Target Markets/Stakeholders*

This is a process of selecting which segments of clients are worth pursuing with the resources available. This will probably include existing markets, but may also include some new markets, or deeper penetration of existing markets. This is a simple statement that reinforces the goals and need only be one or two sentences.

- *Marketing/Engagement Strategies for Target Markets/Stakeholders*

This includes developing any new programs, initiatives or products for certain target markets.

Each strategy should be specific, measurable and achievable and should have a specific KPI over a specific time. This should include:

- Who are you targeting?
- What media are you using?
- What message are you sending?
- How are you delivering it (promotional plans and program)?
- Who is responsible for it?

- How much have you budgeted for it?
- How will you measure success?

## 8. Financial plan

The financial plan should flow logically from the conclusions drawn about your organisation's financial situation as described in the Context section of the strategic plan. It should include:

- an assessment of your organisation's current financial situation (where are we now?)
- a vision of the financial situation at the end of the period covered by the strategic plan (where do we want to be?).

You should provide a budget forecast for each year covered by the strategic plan. The figures in your forecast should support and demonstrate the statements made in your financial plan and throughout your entire strategic plan.

## 9. Management

### Organisational Structure

Include an organisational chart showing role and responsibilities for each position, and to whom they report.

### Staff Information

Include a list of staff members, their position in the organisation and relevant qualifications and experience (See *Figure 4*, Suggested format for staff information).

**Figure 4: Suggested Format for Staff Information**

Name of Staff Member (list all members)	Position	Qualifications and Experience	Years in Current Position

**Role of the Board and Governance**

This will be a list of your Board members, the skills they bring to the Board and specific roles, if any, that they have on the Board. You should provide this information as shown in Figure 5, suggested format for Board information.

**Figure 5: Suggested Format for Board Information**

Name of Director or Committee Member (list all members)	Special Responsibilities, Qualifications and Experience	Years on Board	Term Ends

**Risk Management Plan (see p.32)**

Identify the major obstacles to achieving your strategic plan and goals. Consider what could go wrong and whether you are making assumptions that could be proven to be incorrect. Provide a comprehensive plan that demonstrates:

- probability of all potential risks
- impact of all potential risks
- strategies to mitigate potential risks.

As a guide, some risks to consider include:

- *environmental/external risks* (that is, beyond the control of your organisation) – consider whether any of your income sources have the potential to be affected by significant economic changes. Think about whether your funding is likely to be affected by changes in government or government policy

- *financial risks* – consider whether your organisation can afford the goals and/or strategies and look at your organisation’s level of exposure or financial commitment
- *marketing and reputation risks* – consider whether your organisation has adequate safeguards in place to monitor impacts on credibility and maintain positive stakeholder relationships
- *management risks* – consider whether your organisation has the expertise to manage new strategies and what would happen if key people left your organisation
- *operational risks* – consider whether your organisation can implement the changes in the strategic plan.

# CSR or Community Engagement Strategy

**What is your focus?**

What is the area of interest that is aligned with your community, social and business goals  
for example, employment, education, training, mentoring etc?

**On what will you base your selection of a NFP relationship?**

Example Criteria 1:  
Charitable organisation aligned to strategic focus

Example Criteria 2:  
Financially sound

Example Criteria 3:  
Locally based & focused

Example Criteria 4:  
Volunteer and/or mentor opportunities – or other opportunities to get involved

**Which are the NFPs who meet your criteria?**

Example of NFP & their focus which meets your criteria and focus

Example of NFP & their focus which meets your criteria and focus

Example of NFP & their focus which meets your criteria and focus

**What kind of support is provided?**

Examples:  
Donation of funds, donation of goods and services, fundraising, complimentary tickets to events, communication through networking channels, Refer hosting events, supporting community events, access to members, designing & facilitating workshops for clients, working collaboratively on initiatives

**What additional community relationships do you have?**

List of other organisations currently supported



## Tool 3: Corporate Social Responsibility (CSR) or Community Engagement Strategy Template

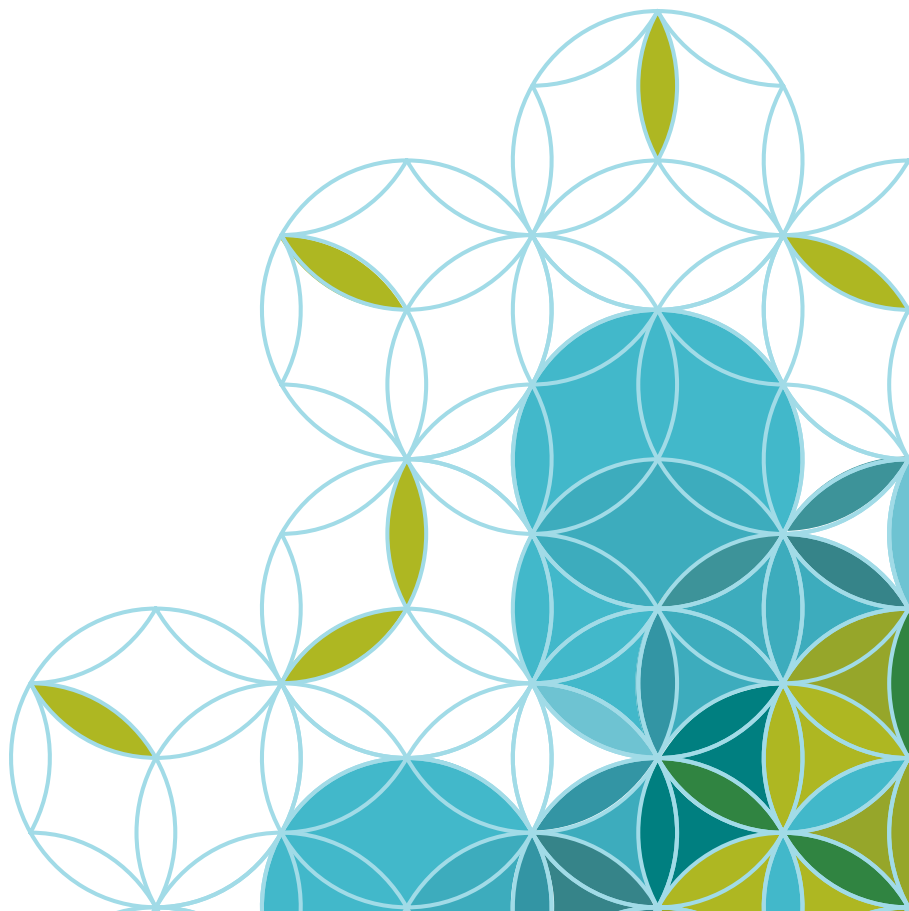
A CSR or community engagement strategy can assist businesses in developing a way to contribute positively to the social and economic development of community NFPs.

Create a CSR or community engagement strategy by using the template provided or develop one to suit your own organisation.

### CSR or Community Engagement Strategy Template

- This template is designed to assist businesses determine the focus and criteria that will align your community orientated objectives with your business objectives.
- It is important that you link this exercise with your strategic or business plan.
- Community NFPs may find this template useful in better understanding how businesses make their decisions about organisations they would consider as partners.

**Note:** The templates in this tool kit are a guide only and can be amended to suit your particular organisation and circumstances.



## Links to Helpful Resources

Resource	Link	Description
Community Business Partnerships	<a href="http://www.maribyrnong.vic.gov.au/Files/Community_Business_Partnerships_a_practical_guide.pdf">www.maribyrnong.vic.gov.au/Files/Community_Business_Partnerships_a_practical_guide.pdf</a>	A practical guide developed by Maribyrnong City Council.
Community-Business Partnerships – Are You Ready? A Checklist	<a href="http://www.ourcommunity.com.au/business/view_article.jsp?articleId=820">www.ourcommunity.com.au/business/view_article.jsp?articleId=820</a>	This checklist developed by the Australian Institute for Corporate Responsibility provides a quick rundown of the basic points prospective partners should have discussed and agreed on before formalising the relationship.
Connect with business	<a href="http://www.abaf.org.au/Media/docs/AbaF-Connect-with-business-9af29f8e-3009-4267-a002-97402978ca7a-0.pdf">www.abaf.org.au/Media/docs/AbaF-Connect-with-business-9af29f8e-3009-4267-a002-97402978ca7a-0.pdf</a>	An Australian Business Arts Foundation guide for arts organisations developing relationships with business
Formalising Partnerships	<a href="http://www.ncoss.org.au/resources/080801-formalising-partnerships-resource-kit.pdf">www.ncoss.org.au/resources/080801-formalising-partnerships-resource-kit.pdf</a>	This resource for undertaking an internal analysis of an organization was developed for the Council of Social Service of New South Wales (NCOSS). Refer to Section 4 Getting Started.
The Partnering Toolbook	<a href="http://www.thepartneringinitiative.org/publications/Toolbooks/The_Partnering_Toolbook.jsp">www.thepartneringinitiative.org/publications/Toolbooks/The_Partnering_Toolbook.jsp</a> <a href="http://www.energizeinc.com/art/subj/documents/ThePartneringToolbook_March2004.pdf">www.energizeinc.com/art/subj/documents/ThePartneringToolbook_March2004.pdf</a>	This book, written for the International Business Leaders Forum, offers a concise overview of the essential elements that make for effective partnering.
The partnerships analysis tool	<a href="http://www.vichealth.vic.gov.au/~media/ResourceCentre/PublicationsandResources/General/Partnerships_Analysis_Tool_2011.ashx">www.vichealth.vic.gov.au/~media/ResourceCentre/PublicationsandResources/General/Partnerships_Analysis_Tool_2011.ashx</a>	This VicHealth resource is for organisations entering into or working in a relationship to assess, monitor and maximise its ongoing effectiveness.

## 2. Finding a Partner/Relationship

### Tool 4: Mud Map Template

Using a Mud Map can be a great way to add structure to brainstorming sessions. It involves writing down a central theme and thinking of new and related ideas which radiate out from the centre.

It can be a useful tool for generating ideas, visualising all aspects of a topic and considering how these relate to each other.

#### How to use the Mud Map and Research Templates

The components of a mud map are arranged according to the importance of the concepts (see following diagram).

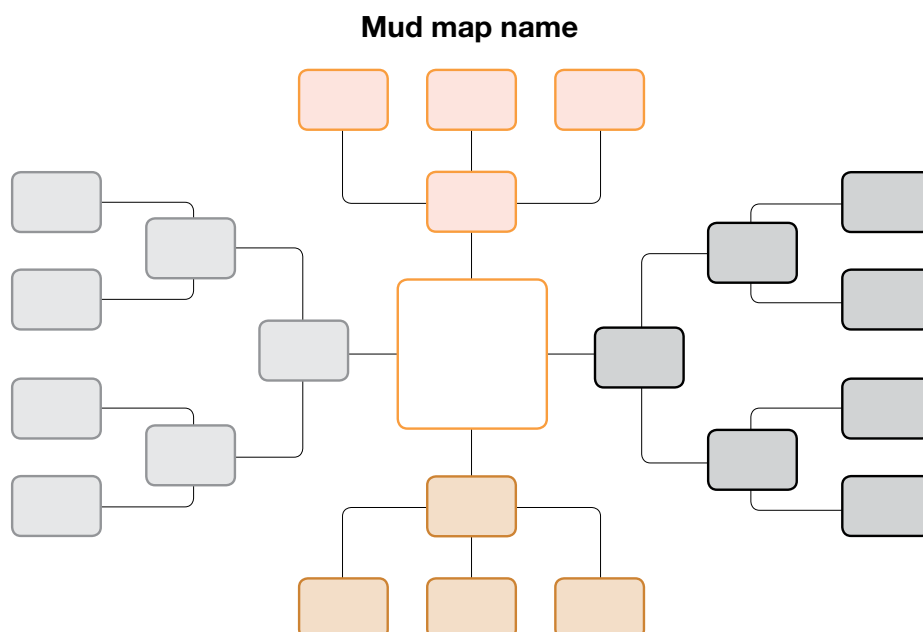
The box in the centre names the subject of the mud map and the branches describe it. Each of the branches represents an important element of the mud map's subject. The further out the branch you go, the more information you learn about each branch. Together the branches give a good understanding of the subject of the mud map.

Mud maps can be used for problem solving, framework design, structure/relationship presentations, condensing material into a concise and memorable format as well as team building or a synergy-creating activity.

How to create a mud map:

- Begin in the centre with the topic and as questions, ideas and related topics come into your mind, put them down.
- Place related ideas close and show connections with lines or arrows.
- Images and colour can be helpful in stimulating your mind to generate ideas and in recalling information.

There is no necessity for a formal document as the majority of people prefer to just free draw.



## Tool 5: Research Template

Both community NFPs and business would be wise to research potential organisations to see if they align with their organisation’s vision/mission and have similar goals.

This template is a guide to the questions you need in researching organisations for potential relationships. It is divided into three categories: knowledge about the organisation, community/business relationships and recommendations.

It is important to document this information at the time of research as it can not only assist you in the short term for finding potential relationship organisations but also in the long term – for example, an organisation may have specific timeframes for applications to be received or their commitments have already been allocated for the financial year. This information is then documented for follow up at the appropriate time.

**Note:** The templates in this tool kit are a guide only and can be amended to suit your particular organisation and circumstances.

Research Template	
Date:	
Organisation:	
Key Contact 1:	
Key Contact 2:	
Key Contact 3:	
Address:	
Telephone:	
Email:	

Simply tab to relevant shaded areas, type text and click with the mouse on the check-boxes.

Section 1: Knowledge about the Potential Partner	
How would you describe the organisation?	
What is their vision?	
What is their mission?	
Is their vision/mission compatible with ours?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:

### Section 1: Knowledge about the Potential Partner (continued)

How did you hear about the organisation?	<input type="checkbox"/> Board Member
	<input type="checkbox"/> Staff Member
	<input type="checkbox"/> Affiliated Organisation
	<input type="checkbox"/> Media
	<input type="checkbox"/> Partnership Brokering Organisation
	<input type="checkbox"/> Web
	<input type="checkbox"/> Word of Mouth
	<input type="checkbox"/> Network
	<input type="checkbox"/> Annual Report
	<input type="checkbox"/> Social Media (Facebook/Twitter)
<input type="checkbox"/> Other	
Does anyone already have a relationship with the organisation and/or people using the organisation?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:
Have you talked with someone who has partnered with them before?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:
Do they have a Strategic/Business Plan? This may be found on their website.	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:

### Section 2: Community/Business Relationships

Do they currently have community/business relationships?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:
Are these relationships similar to your organisation?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:
Do they promote these relationships and how?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:
Do they understand what a relationship is between a community NFP and business?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes please specify:

### Section 2: Community/Business Relationships (continued)

Why would they want to have a relationship?	
What can you see that they would get out of a relationship?	
What would you get out of the relationship?	
What is their reputation?	
What is their reputation for sponsorships?	

### Section 3: Recommendations

Would you recommend commencing a relationship with this organisation?	<input type="checkbox"/> Definitely
	<input type="checkbox"/> Probably
	<input type="checkbox"/> Not Sure
What kind of relationship will be requested?	<input type="checkbox"/> Funding of Project
	<input type="checkbox"/> Sponsorship of Event
	<input type="checkbox"/> Fundraising
	<input type="checkbox"/> Events and Activities
	<input type="checkbox"/> Volunteering
	<input type="checkbox"/> Provision of Products, Services, Space
	<input type="checkbox"/> Staff Giving
	<input type="checkbox"/> Training/Mentoring
Do you have a Partnership Brokering organisation?	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
	If yes please specify:

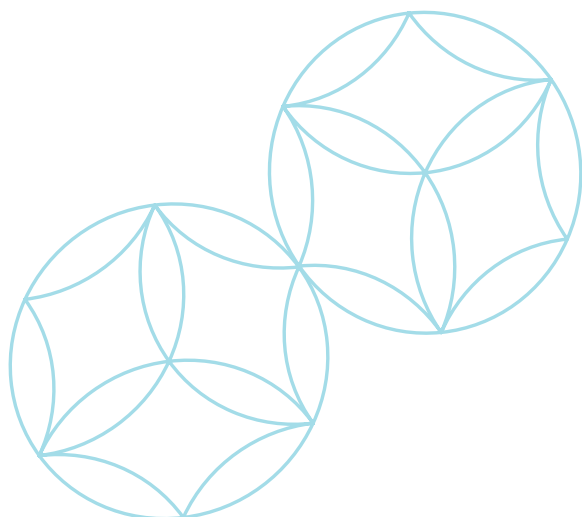
General Comments:

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## Links to Helpful Resources

Resource	Link	Description
Community Business Partnerships	<a href="http://www.maribyrnong.vic.gov.au/Files/Community_Business_Partnerships_a_practical_guide.pdf">www.maribyrnong.vic.gov.au/Files/Community_Business_Partnerships_a_practical_guide.pdf</a>	A practical guide developed by Maribyrnong City Council.
Community-Business Partnerships Resource Centre	<a href="http://www.ourcommunity.com.au/business/view_article.jsp?articleId=805">www.ourcommunity.com.au/business/view_article.jsp?articleId=805</a>	A series of practical, no-nonsense help sheets for community groups, developed by the Australian Institute for Corporate Responsibility, taking you through the main steps of initiating, nurturing and expanding community-business relationships.
Community-Business Partnerships – Are You Ready? A Checklist	<a href="http://www.ourcommunity.com.au/business/view_article.jsp?articleId=820">www.ourcommunity.com.au/business/view_article.jsp?articleId=820</a>	This checklist, developed by the Australian Institute for Corporate Responsibility, provides a quick rundown of the basic points prospective partners should have discussed and agreed on before formalising the relationship.
Connect with business	<a href="http://www.abaf.org.au/Media/docs/AbaF-Connect-with-business-9af29f8e-3009-4267-a002-97402978ca7a-0.pdf">www.abaf.org.au/Media/docs/AbaF-Connect-with-business-9af29f8e-3009-4267-a002-97402978ca7a-0.pdf</a>	An Australian Business Arts Foundation guide for arts organisations developing relationships with business
Corporate Responsibility / Community	<a href="http://www.nab.com.au/wps/wcm/connect/nab/nab/home/about_us/7/4">www.nab.com.au/wps/wcm/connect/nab/nab/home/about_us/7/4</a>	The NAB Corporate Community Strategy is a useful read for understanding the approach of one of Australia's largest banks.
Establishing a workplace giving relationship with business	<a href="http://www.dpcd.vic.gov.au/_data/assets/pdf_file/0009/63459/Guide-to-Workplace-Giving-FINAL-@-21-04-11.pdf">www.dpcd.vic.gov.au/_data/assets/pdf_file/0009/63459/Guide-to-Workplace-Giving-FINAL-@-21-04-11.pdf</a>	An Office for the Community Sector step-by-step guide for not-for-profit community organisations on workplace giving and how it works.

Resource	Link	Description
Increase Your Chance of Success with a Business Plan – Business Plan Template	<a href="http://www.business.vic.gov.au/operating-a-business/how-to-start/business-planning">www.business.vic.gov.au/operating-a-business/how-to-start/business-planning</a>	Free business plan template to create an action plan for your business. This link also includes a Financial Statement Template and a Cash Flow Forecast Template.
Partnerships management: Working with partners	<a href="http://www.who.int/management/partnerships/overall/en/index.html">www.who.int/management/partnerships/overall/en/index.html</a>	This is a World Health Organisation resource. Refer to Tool 1 Partner Assessment Form and Partnerships Tools and/or Tool 2 Coherence Assessment Questionnaire.
The partnerships analysis tool	<a href="http://www.vichealth.vic.gov.au/~/_/media/ResourceCentre/PublicationsandResources/General/Partnerships_Analysis_Tool_2011.ashx">www.vichealth.vic.gov.au/~/_/media/ResourceCentre/PublicationsandResources/General/Partnerships_Analysis_Tool_2011.ashx</a>	This VicHealth resource is for organisations entering into or working in a relationship to assess, monitor and maximise its ongoing effectiveness.
Workplace Giving Booklet	<a href="http://www.fahcsia.gov.au/sites/default/files/documents/05_2012/workplace_giving_cd_0.pdf">www.fahcsia.gov.au/sites/default/files/documents/05_2012/workplace_giving_cd_0.pdf</a>	Workplace giving guide to assist setting up regular donations to charitable organisations through automated payroll deductions.





### 3. Approaching a Potential Partner

#### Tool 6: Develop an ‘Elevator Speech’

Imagine you have an opportunity to present your pitch in person in the time it would take to go a few floors in an elevator or you may be sitting or standing next to a prospective partner at a social or business event. What would you say? How would you quickly and succinctly present all of the important information in your pitch to a potential partner?

If you want to use this approach as part of your conversation to demonstrate how and why a relationship with your organisation would work, or why it would be a good thing, consider the following:

##### **When you only have a minute to explain**

– Decide on key message and fill in the gaps.

*(Name of your organisation) works with (client or group) to (statement of need or opportunity) so they can (outcome) which means that (statement of key benefit).*

**We’re the only organisation that** *(unique selling point)* **and if we can** *(intended action and requirements)* **we can achieve** *(new goal).*

**We’re coming to you because** *(state potential partnership).* **We can offer you** *(state what you can offer)* **and need** *(state needs)* **from you. This partnership would help us** *(restate goal)* **and would help your** *(business or social goal).*

**Together we can** *(joint achievement).*

## Tool 7: Prepare and Present a 'Pitch'

Your pitch is an important tool to enable a potential partner organisations or business to assess whether they would like to form a relationship with your organisation.

This pitch can include:

- The history of the organisation
- Your organisation's credentials
- Your successes and the challenges, current partners
- Why you would like to partner?
- What might be involved in the relationship?
- What you have to offer and the benefits to them.

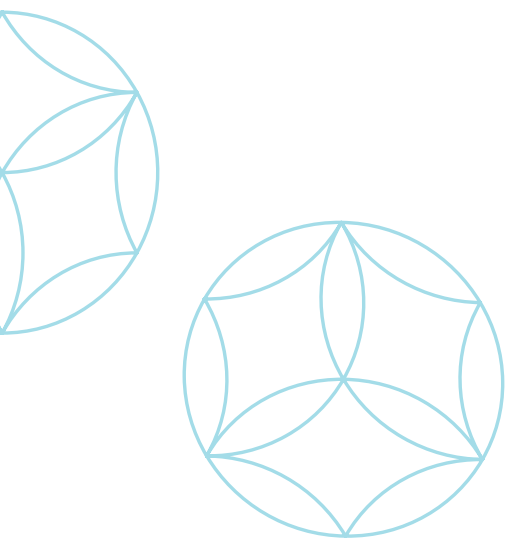
This document is generally one 1 – 2 pages long and outlines basic information about the organisation/business. It should be kept simple and should contain an overview, main body and a conclusion.

**Overview:** This should include the name of your organisation/business, location, the purpose, financial status and your current partnerships.

**Main Body:** This should cover the sector your organisation/business works in and a comparison with similar organisations/businesses. NFPs pitching to business should include estimated funding for the next 12 months, as well as what the deliverables are and more importantly what would be the return on their investment (ROI) for the business partner.

**Conclusion:** In closing you should take the opportunity to leave a final impression and state why forming a relationship would be beneficial for both parties.

Once your pitch has been developed, a meeting with the relevant organisation/business should be organised so that your pitch can be presented.



# Tool 8 : The Proposal Template

Once you have made your pitch in person or in writing to the relevant organisation, you may be required to provide a formal proposal outlining what you would like to achieve through a partnership.

This template forms the basis for presentations to potential organisations, particularly where they have invited you to send them a proposal.

In preparing your proposal, make your presentation believable and acceptable by supplying the most appropriate supporting material. Choose data that best supports your proposal.

When you have drafted your proposal, making sure to include information of particular interest, revise and fine-tune the draft till you feel confident submitting it to the potential partnership organisation. Remember to check spelling, punctuation and grammar.

If you have useful contacts at potential organisations, you may wish to ask them to introduce you by phone call or letter.

## Proposal Template

*[Insert Name of Proposal]*

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**Note:** Be brief and concise but make the information interesting.

Modify your approach according to the nature of the request or simply pick the relevant components.

### 1. Summary

#### 1.1. What are you seeking?

- Briefly provide details on what the specific relationship and/or project entails and the budget
- What are the linkages between the organisations?
- What would the relationship bring to each party?
- What would be the impact?

### 2. Our Organisation

#### 2.1. History

Describe the history of the organisation.

#### 2.2. Purpose and Work

Describe the purpose and work of the organisation.

#### 2.3. Legal Status

What is the legal status of the organisation?

Provide the ABN, ATO status i.e., DGR, company by limited guarantee etc.

#### 2.4. Administration and Infrastructure

Describe how the organisation is administered.

#### 2.5. Location and Reach

Where is the organisation located and what areas do they service i.e., is it Victorian- based or national?

#### 2.6. Communities and Populations Served

What is the focus of the service provided?

## 2.7. Accomplishments

Provide the inputs, processes and outcomes of the organisation since its inception.

## 2.8. Challenges

Describe what have been the challenges.

## 2.9. Capacity

Describe your capacity in learning and development.

What is your capacity to have multiple relationships?

## 3. Current Funding Sources/Partners

Provide information on who are your current funding sources and/or partners.

## 4. What are you going to do

Provide information on what you are going to do.

## 5. Partnership Request

### 5.1. What are you seeking?

- Funding of a Project
- Sponsorship of an Event
- Fundraising
- Events and Activities
- Volunteers
- Provision of Products/Services/Space at best possible price
- Staff Giving
- Training/Mentoring
- Building Knowledge
- Formalising policy change re business practice for example, loyalty program
- Social Procurement
- Desired impact or outcome.  
What do you want the relationship to achieve?

## 5.2. Evaluation

- Identify who will be participating
- List the benefits for both parties
- How will the partnership be measured?
- Provide the timelines of the relationship
- If you are already in a partnership, describe it and provide evidence
- If the partnership is for a specific program/project provide a description, how it works and the objectives.

## 5.3. Budget

- Included budget details for the partnership program/project

## 6. Contact Details

Provide the contact details of the person/s that will be responsible for all communication between partners.

Name:

---

Title:

---

Office:

---

Mobile:

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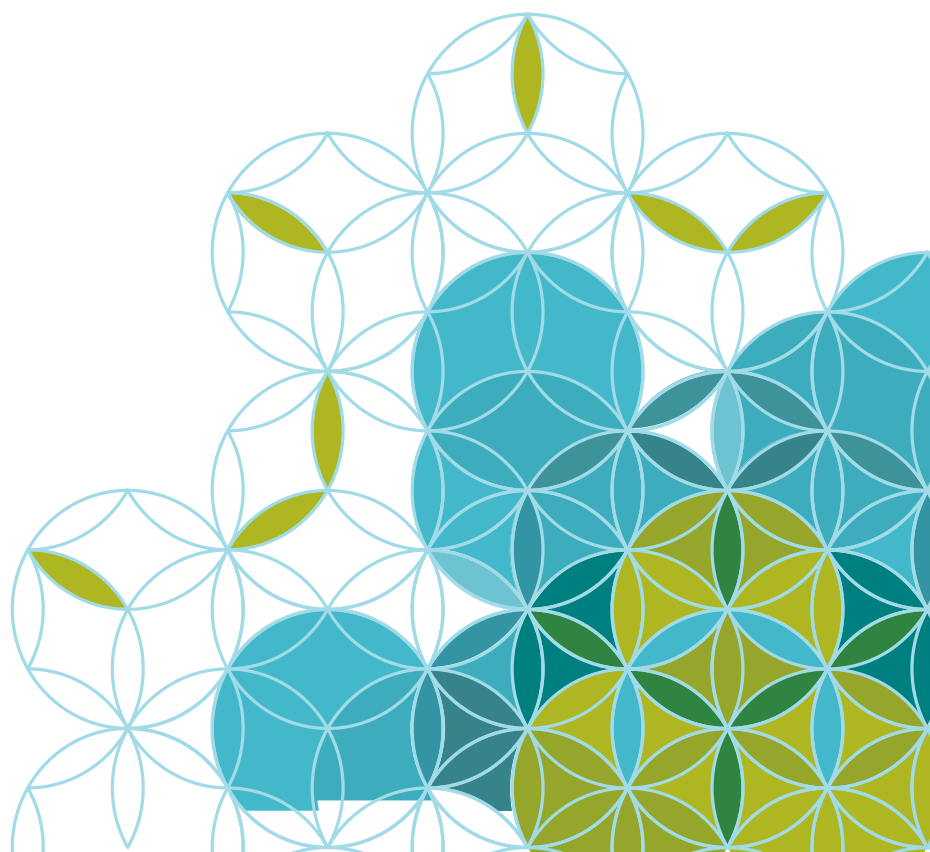
Email:

---

**Note:** Consider how you will present the information? Photos to demonstrate work/printed brochure.

## Links to Helpful Resources

Resource	Link	Description
Inviting Investment in Social Enterprises – A Prospectus Framework for the Social Sector	<a href="http://www.rosstrust.org.au/docs/RERoss_Prospectus.pdf">www.rosstrust.org.au/docs/RERoss_Prospectus.pdf</a>	This R E Ross resource provides a framework for community organisations to communicate their case for investment in their organisations and their work.
Partnering with Small to Medium Sized Businesses – A Guide for Community Organisations	<a href="http://www.fahcsia.gov.au/sites/default/files/documents/05_2012/flyer_final.pdf">www.fahcsia.gov.au/sites/default/files/documents/05_2012/flyer_final.pdf</a>	This tool was jointly written by Social Compass and Transfield Services as a contribution to community organisations that want to develop a community business partnership.



# 4. Establishing the Relationship

## Tool 9: Plan on a Page

This is a simple means of ensuring that you are literally on the 'same page' with the potential partnership organisation.

Jointly or individually develop a plan for your shared activity or relationship, using this template. The completed template will show the current situation, where you want to be or what you want to achieve and how you aim to get there. This is likely to be part of your organisation's strategic plan.

The template provided here was supplied and successfully used by The Smith Family (Ballarat).

WHERE WE ARE NOW  
(CURRENT SITUATION)

- 
- 
- 
- 
- 
- 
- 
- 
- 
-

HOW

WHERE WE WANT TO  
BE/HAVE ACHIEVED

- 
- 
- 

Measure	2012	2013	2014

**STRATEGIES**  
WHAT

**ACTION PLANS**  
HOW

**RESPONSIBILITY**  
WHO

**TIMING**  
WHEN

---



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# Tool 10: Memorandum of Understanding Template

Many community NFPs and businesses require a Memorandum of Understanding (MOU), formalizing the partnership and joint objectives. This template is to assist you in creating an MOU, which highlights the objectives and management arrangements of a partnership. It may also explain communication, information sharing and consultation processes. It is not a legal document though it may outline the partnership's governance structure and source of authority.

An MOU is not limited to the 15 categories listed in the template but these are the basic categories required for an MOU.

The text in italics shows where you are required to fill in the information required for an MOU.

Incorporate or attach any formal proposals to the MOU. Aspects of funding or financial arrangements, timelines, timeframes, project plan and budget are often incorporated.

## Memorandum of Understanding Template

### 1. Partner Organisations

The Memorandum of Understanding is between:

*Name, Title, Organisation & Address  
(principal place of business)*

And

*Name, Title, Organisation & Address  
(principal place of business)*

### 2. Duration of Agreement

This is a statutorily required element. While the length of the initial agreement is negotiable between the local board and the partner(s), all MOUs should initially be for a period of at least one year. Modification, extension, and termination procedures are described in a separate section of this template document.

### 3. Rationale/Scope

Include a statement of purpose, and/or a brief description of expectations, and/or a justification for the partnership.

### 4. Goals and Objectives

Include a description of the goals and objectives of the partnership.

### 5. Roles and Responsibilities

To be discussed with the Partnership Group/Advisory Group. Some examples may include:

The Partnership/Advisory Group is accountable for:

- fostering collaboration;
- removing obstacles to the partnership's successful delivery, adoption and use;
- maintaining at all times the focus of the partnership on the agreed scope, outcomes and benefits; and
- monitoring and managing the factors outside the partnership's control that are critical to its success.

The membership of the Partnership/Advisory Group will commit to:

- attending all scheduled Partnership Group/Advisory Group meetings;
- championing the Partnership within and outside of work areas;

- sharing all communications and information across all Partnership/Advisory Group members;
- making timely decisions and take action so as to not hold up the project;
- notifying members of the Partnership Group/Advisory Group, as soon as practical, if any matter arises which may be deemed to affect the development of the partnership;
- attending all meetings and if necessary nominating a proxy.

Members of the Advisory Group expect:

- that each member will be provided with complete, accurate and meaningful information in a timely manner;
- to be given reasonable time to make key decisions;
- to be alerted to potential risks and issues that could impact the project, as they arise;
- open and honest discussions, without resort to any misleading assertions;
- on-going checks to verify the overall status and ‘health’ of the partnership.

## 6. Governance Structure and Reporting

Including a description of the governance structure and reporting responsibilities may be useful.

## 7. Meetings

Include a description of when and how meetings will be conducted. Some examples may include:

- All meetings will be chaired by *(insert name/position and organisation)*.

- A meeting quorum will be *(insert number)* members of the advisory group.
- Decisions will be made by consensus (i.e., members are satisfied with the decision even though it may not be their first choice). If consensus cannot be reached, Advisory Group chair makes the final decision.
- Meeting agendas and minutes will be provided by *(Insert name/position and organisation)*, who will:
  - prepare agendas and supporting papers;
  - prepare meeting notes and information.
- Meetings will be held *(how often)* for *(specify time)* at *(specify location)*.
- If required, subgroup meetings will be arranged outside of these times at a time convenient to subgroup members.

## 8. Reporting

In this section describe the reporting process that will be put in place to ensure progress reports, communication, minutes from meetings etc are delivered in the required timeframe. This could include:

- All partners will adhere to any prescribed reporting schedules.
- All partners will provide any required performance data.
- All partners will provide any required data in a compatible format.
- All partners agree to work toward the development of common performance goals and measures that will be in alignment with the stated goals.



**9. Communication, Information Sharing and Consultation Processes**

Include an outline of how information and data that is generated by the partnership is to be handled by all parties to the agreement. Include confidentiality considerations.

**10. Advertising**

The partnership organisation is to be acknowledged in all promotional materials like newsletters, media releases, brochures, flyers, annual reports, event programs. When acknowledging the partnership organisation, ensure that the full and correct name of the (*organisation*) is used, as it appears in this MOU.

The (*organisation*) is to approve all material displaying the name and/or logo prior to distribution.

**11. Conflict Resolution**

In this important section, describe the process for resolving disputes that may arise among the partners to the agreement.

**12. Modification/Termination**

This MOU constitutes the entire agreement between the parties hereto. This MOU may be modified, altered, revised, extended or renewed by mutual written consent of all parties, by the issuance of a written amendment, signed and dated by all the parties. Submission of a revised MOU does not necessarily require a modification to the plan.

Any party to this MOU may terminate their participation in this MOU by giving not less than (*stipulate days*) calendar days' prior written notice of intent to terminate to each of the partners. In such case, termination by one or more of the parties to this MOU does not alter the terms or obligations of the other parties to this MOU.

**13. Review and Evaluation**

Determine the timeframe for reviews for the duration of the MOU and include reference review/exit plan.

Set out plans and methods to determine whether the partnership has met its objectives.

Include how to get feedback from partners and any other key players who can provide information on the effectiveness of the partnership.

Include a strategy to regularly review operational processes and identify issues of concern. Collect data on success rates and reassessments.

**14. Resources**

Identify the equipment, resources and materials facilities that will be contributed by partnership members.

**15. Authorisation**

The signing of this MOU is not a formal undertaking. It implies that the signatories will strive to reach the objectives stated in the MOU, to the best of their ability.

Partnering Organisation:

\_\_\_\_\_

Name:

\_\_\_\_\_

Date:

\_\_\_\_\_

Title:

\_\_\_\_\_

# Tool 11: Risk Management Plan Template

Develop a risk management plan for your shared activity or relationship that identifies the risks that may prevent the objectives being met. This can be done jointly or individually and then combined.

## 1. Purpose of the Risk Management Plan

The purpose of the risk management plan is to allow an organisation to identify and record potential risks. The plan also allows mitigation strategies to be developed and tracked.

The document should be updated whenever is necessary, ie following an incident of significant impact on the organisation's day-to-day operation.

## 2. Organisational Context

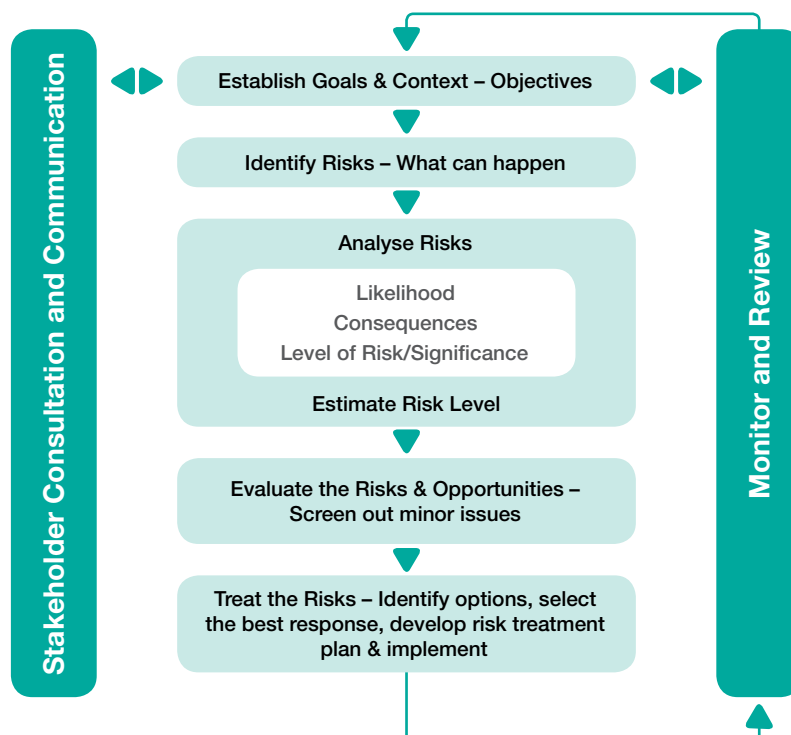
It is not possible to avoid risk entirely. To attempt to do so would mean that the organisation would effectively be unable to function. It would also not be able to take advantage of opportunities as they arise.

*The Board should use this heading to describe what their willingness to accept risks is. This should be described in the context of the type of organisation it is. For example: "As a not for profit community organisation we have limited financial resources. Our primary responsibility is to our clients. As recipients of government funding we also have a responsibility to use our resources wisely. These factors mean that the Board's attitude to risk is generally cautious."*

Stating the organisational context and the Board's appetite for risk sets the tone for the whole organisation and for the risk management plan in particular.

## 3. Risk Diagram

The following diagram represents a process to be followed:



## Identify the Risks

Use this space to list the main risks you have identified. This work should be carried out in consultation with key stakeholders including staff at all levels of the organisation.

In order to address group-related risks you may wish to use headings such as those in the table below. Please note this is not intended to be a comprehensive list of all the risks organisations are likely to encounter. It is essential that each provider undertakes the risk identification process for itself.

Internal	External
<p><b>Financial management</b>, for example:</p> <ul style="list-style-type: none"> <li>– Viability / liquidity</li> <li>– Fraud control</li> <li>– Reducing / insufficient income streams</li> <li>– Income loss</li> <li>– Poor cost control</li> <li>– Insurances not kept up to date</li> </ul>	<p><b>Funding</b>, for example:</p> <ul style="list-style-type: none"> <li>– Changes in funding agreements</li> <li>– Shortfalls in funding programs</li> </ul>
<p><b>Human Resources</b>, for example:</p> <ul style="list-style-type: none"> <li>– Succession planning</li> <li>– Poor staff supervision and performance appraisal</li> <li>– Staff turnover/ headhunted by competitor</li> <li>– Excessive work load and poor staff morale / staff burn-out</li> <li>– Difficulties in recruiting suitable staff</li> </ul>	<p><b>Regulatory environment</b>, for example:</p> <ul style="list-style-type: none"> <li>– Changes in regulatory framework</li> <li>– Negative registration reports</li> <li>– No internal systems to proactively manage all the factors that drive the performance of the organisation</li> </ul>
<p><b>Property management</b>, for example:</p> <ul style="list-style-type: none"> <li>– Inappropriate stock</li> <li>– Contractors fail to perform maintenance contract / Poor response time by contractors</li> <li>– Stock transfer liabilities</li> <li>– Asbestos</li> <li>– Aging / poor quality stock</li> </ul>	<p><b>Reputation</b>, for example:</p> <ul style="list-style-type: none"> <li>– Public and community perception of the Association</li> <li>– Negative comments from press or politicians</li> </ul>
<p><b>Legislation compliance</b>, for example:</p> <ul style="list-style-type: none"> <li>– Privacy Act</li> <li>– Corporations Act / relevant Incorporation legislation</li> <li>– Anti-discrimination / Disability Services Act</li> <li>– OHS</li> <li>– Meeting tax requirements</li> </ul>	<p><b>Competition</b>, for example:</p> <ul style="list-style-type: none"> <li>– Losing opportunities to grow</li> <li>– Other providers</li> <li>– Unexpected rapid growth</li> </ul>

Internal	External
<p><b>Corporate governance</b>, for example:</p> <ul style="list-style-type: none"> <li>- Lack of appropriately skilled board members</li> <li>- Volunteer / board member burn out</li> <li>- Board turnover</li> <li>- Board fails to appraise CEO performance</li> <li>- Conflict on the board</li> <li>- Conflicts of interest not managed effectively</li> <li>- Difficulty recruiting to the board</li> <li>- Director's insurance not kept up to date</li> <li>- Policies and procedures not reviewed</li> <li>- Board lacks a value based framework</li> </ul>	<p><b>Partnerships</b>, for example:</p> <ul style="list-style-type: none"> <li>- Risks from failed partnership arrangements</li> <li>- Risk of conflict with partners</li> </ul>
<p><b>Information technology</b>, for example:</p> <ul style="list-style-type: none"> <li>- IT not sufficient for expanded organisation</li> <li>- IT not able to produce registration monitoring data</li> <li>- IT performance date disaster recovery plan</li> </ul>	

#### 4. Example of a Risk Treatment Plan Template

##### Reference:

**Risk Identified and Likely Impact**

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**Summary of Recommended Response**

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**Action Plan**

Proposed Actions

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**Resource Requirement**

---

**Responsibility**

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**Timing**

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**Reporting and Monitoring Required**

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Compiled by:	Date:
Reviewed by:	Date:

## 5. Review of the Risk Management Plan

Under this heading, include information on how often risks will be reported to the Board, which risks will be reported on (top 10 or 20), who is responsible for reviewing risks, how will risk management be embedded into the organisation's processes and whether your risk management plan ensures that key risks identified can be managed effectively.

## Links to Helpful Resources

Resource	Link	Description
Formalising Partnerships Kit	<a href="http://www.ncoss.org.au/resources/080801-formalising-partnerships-resource-kit.pdf">www.ncoss.org.au/resources/080801-formalising-partnerships-resource-kit.pdf</a>	This resource was developed for the Council of Social Service of New South Wales (NCOSS). It provides general information and guidance on formalising relationships.
Memorandum of Understanding Template	<a href="http://www.eduweb.vic.gov.au/edulibrary/public/partnerships/mout.pdf">www.eduweb.vic.gov.au/edulibrary/public/partnerships/mout.pdf</a>	This template was obtained from the Department of Education and Early Childhood Development public library and is a Memorandum of Understanding (MOU) template for relationships.
PILCH (Public Interest Law Clearing House (VIC) Inc	<a href="http://www.pilch.org.au">www.pilch.org.au</a>	PILCH is an independent, not-for-profit organisation which provides pro bono legal services to Victorian individuals and organisations in need.
Partnerships Management: Working with partners	<a href="http://www.who.int/management/partnerships/overall/en/index.html">www.who.int/management/partnerships/overall/en/index.html</a>	Refer to Tool 3 Partnering Agreement & 4 Partnering Roles & Skills Questionnaire and Tool 5 Guidelines for Partnering Conversations.
Volunteer Organisation Leadership Victoria and Greatconnections	<a href="http://www.leadershipvictoria.org/projects/skillsbank-application-form">www.leadershipvictoria.org/projects/skillsbank-application-form</a>	SkillsBank and other projects deploy Leadership Victoria Alumni to address emerging issues that call for exceptional leadership.
Volunteer Organisation goodcompany	<a href="http://www.goodcompany.com.au">www.goodcompany.com.au</a>	goodcompany provides skilled volunteers for community groups.

## 5. Keeping it on Track

### Tool 12: Communication Checklist

Create and maintain a communication plan and/or checklist. This should be developed by both parties at the commencement of the relationship, to agree on timelines and ways of communicating, determining and allocating the tasks to be undertaken, and setting deadlines to keep track of progress.

#### How to use the Communication Checklist Template

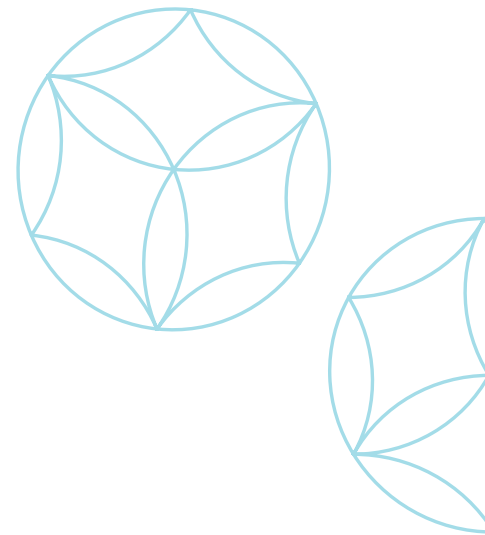
The communications checklist/template helps partners to identify and achieve the communication responsibilities of the relationship.

A communication plan can describe what you want to accomplish through your communications; these objectives should be realistic and measurable.

The checklist provided here provides some trigger questions and examples of specific communication strategies that could be set in place.

**Note:** This template is a guide only and can be amended with information relevant to your own organisation.

This is an example of questions you could ask.



## Communication Checklist

	Responsibility	How	Status	Comments	
Who are the key points of contact?					
Who is responsible at senior levels in each organization for managing the relationship?					
Who is responsible for the day-to-day liaison across the relationship?					
<b>Communication Management</b>					
What are the agreed reporting procedures? e.g. reporting template; via steering group etc.			<input type="checkbox"/> Plan	<input type="checkbox"/> Report	
			<input type="checkbox"/> Other		
What are the agreed on timeframes for reporting? e.g. quarterly, half yearly, annually.					Refer to Plan on a Page Template
How will ongoing communications be managed? e.g. key contacts across both organizations.					
How will communications be documented?			<input type="checkbox"/> Plan	<input type="checkbox"/> Report	
			<input type="checkbox"/> Other		
<b>Promotion &amp; Events</b>					
How will you communicate and promote the relationship internally and externally?			<input type="checkbox"/> Email	<input type="checkbox"/> Letter	
			<input type="checkbox"/> Phone	<input type="checkbox"/> Newsletter	
			<input type="checkbox"/> Event	<input type="checkbox"/> Flyer	
			<input type="checkbox"/> Other		
Who will be responsible in your organisation for the development of promotional material?			<input type="checkbox"/> Internal	<input type="checkbox"/> External	
Who will be responsible in your organisation for the organisation of an event?			<input type="checkbox"/> Internal	<input type="checkbox"/> External	



## Links to Helpful Resources

Resource	Link	Description
Partnerships Management: Working with partners	<a href="http://www.who.int/management/partnerships/overall/en/index.html">www.who.int/management/partnerships/overall/en/index.html</a>	This is a World Health Organisation resource. Refer to Tool 8 Communications Checklist
The partnerships analysis tool – A checklist	<a href="http://www.vichealth.vic.gov.au/~media/ResourceCentre/PublicationsandResources/General/Partnerships_Analysis_Tool_2011.ashx">www.vichealth.vic.gov.au/~media/ResourceCentre/PublicationsandResources/General/Partnerships_Analysis_Tool_2011.ashx</a>	<p>This activity involves the completion of a checklist that defines key features of a successful relationship.</p> <p>The VicHealth partnerships analysis tool is good example of a checklist that can be used in assessing the current status of the relationships. This checklist is available online as a saveable PDF, which means the calculations will be done automatically and you can save your score and share it with your partners. It can be useful in tracking a relationship over time.</p>

## 6. Review/ Renew/ Next Steps

### Tool 13: Review/Renew/Exit Checklist

For both community NFPs and business a Review Evaluation Checklist can be completed individually and then discussed jointly.

This review can cover outcomes achieved, any issues with the partnership including expectations and communications, levels of satisfaction, opportunities to be investigated and the future of the relationship.

#### How to use the Review/Renew/Exit Template

This template can assist you in evaluating the relationship including the goals achieved, any issues raised, lessons learned and any further opportunities.

The template is designed to be used at key points through the relationship and at the completion of the project or agreed relationship period.

It would be recommended that both parties complete this document and discuss at the completion of the project.

**Note:** This template is a guide only and can be replaced with questions relevant to your own organisation.



## Review/Renew/Exit Checklist

Name of Organisation:						
Partnership Dates:						
Category	Question	Assessment			By Whom	Comment
		Yes	No	Other		
<b>Outcomes</b>	Were the goals achieved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Were the objectives achieved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Were there additional outcomes achieved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Was the partnership successful?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Timeframe</b>	Was a timeframe set in the first place?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	If so, were the outcomes achieved in time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Communication</b>	Was the amount of communication satisfactory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Were progress reports completed in a time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Has an exit report been completed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Promotion</b>	Was there adequate promotion of the partnership?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Will the promotion continue at the end of the partnership?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Issues/ Problems</b>	Did any issues/problems arise?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	If so, were they handled appropriately and resolved to the satisfaction of both parties?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Would you handle them differently? How?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Learnings</b>	Were there lessons learned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	What worked?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Did anything not work well?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Would you handle issues differently?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Opportunities</b>	Are there opportunities to partner in the future?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Have you referred the partner organisation to others?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<b>Renew/Extend</b>	Will the partnership be renewed or extended?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

## Links to Helpful Resources

Resource	Link	Description
Australian Business Arts Foundation – Connecting with Business	<a href="http://www.abaf.org.au/Media/docs/AbaF-Connect-with-business-9af29f8e-3009-4267-a002-97402978ca7a-0.pdf">www.abaf.org.au/Media/docs/AbaF-Connect-with-business-9af29f8e-3009-4267-a002-97402978ca7a-0.pdf</a>	An Australian Business Arts Foundation guide for arts organisations developing relationships with business. Chapter 8 provides points for reviewing, renewing or exiting a relationship.
Lessons Learned – A Community Group Reviewing a Successful Community Business Partnership	<a href="http://www.ourcommunity.com.au/funding/funding_article.jsp?articleId=1111">www.ourcommunity.com.au/funding/funding_article.jsp?articleId=1111</a>	This resource developed by Our Community provides a series of questions for your final review.

