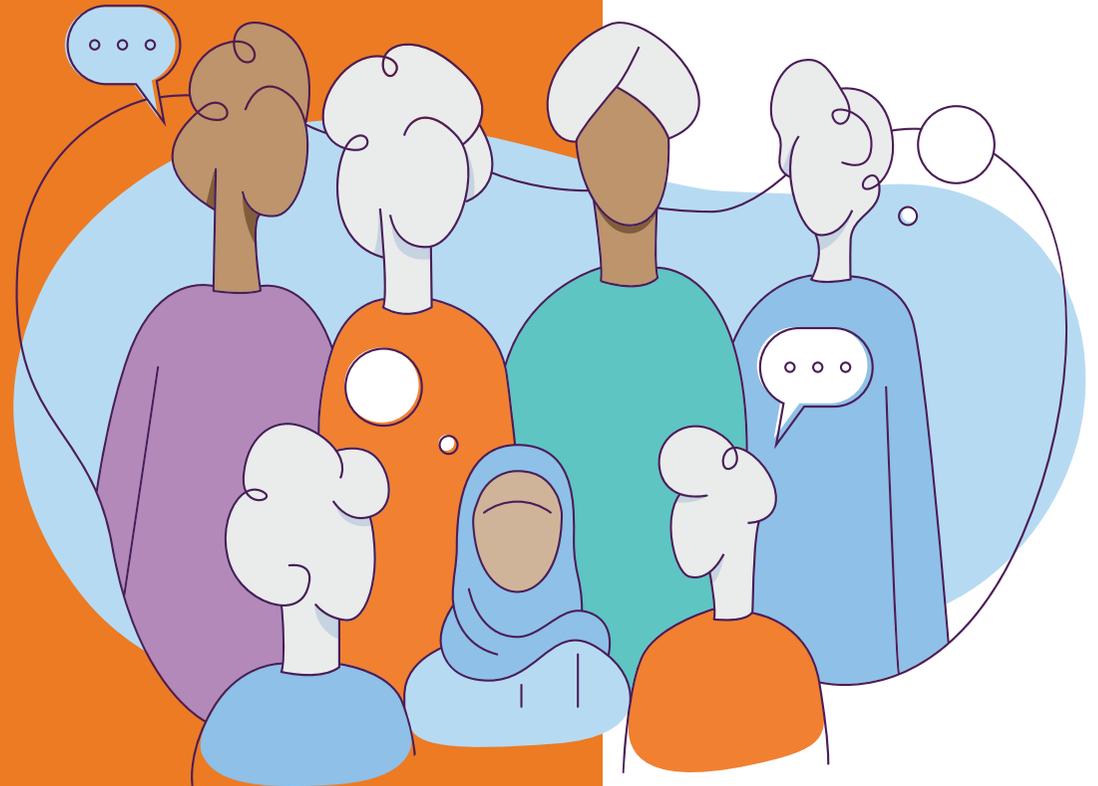




CHARITY SELECTION PROCESS



YOUR GUIDE TO CHOOSING THE RIGHT CHARITY FOR YOUR BUSINESS

We're helping you think about what to consider when you're choosing a charity partner, from shortlisting charity partners to conducting an employee nominated vote.

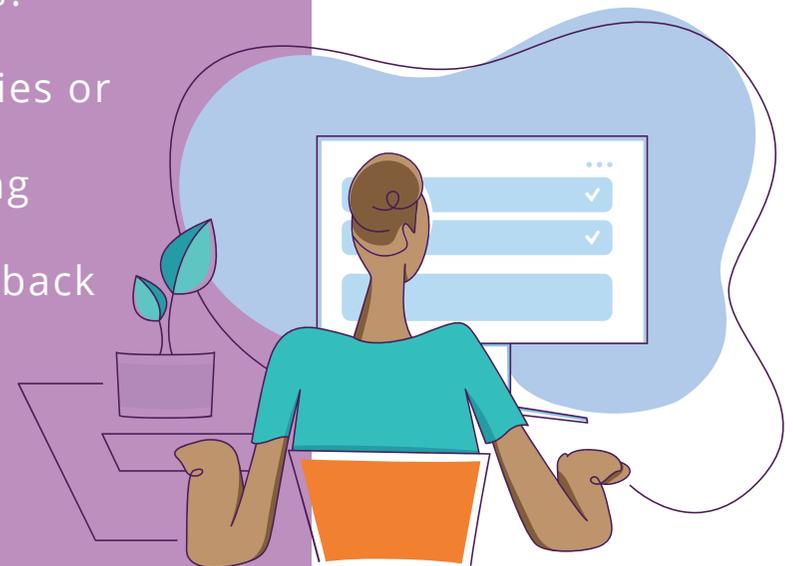


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WHAT TO CONSIDER WHEN SHORTLISTING AND NOMINATING

1. What are the aims of your charity partnership? Do you want to engage employees, enhance your brand or support a cause related to your business? Deciding this will help you develop criteria for the types of charities your business can partner with. Then ask yourself:

- What's the charity's impact on the community?
- How big is the organisation, and what impact can your business have on it?
- Will you be a small fish in their big pond, or do you want to be the primary funder?
- How well does this organisation fit your chosen themes?
- Does the charity fit any geographical requirements?
- How well does the cause relate to your business activities or commercial strengths?
- Does the charity offer any engagement and volunteering opportunities for your employees?
- Does the charity have fundraising events you can piggyback onto?



2. What are the components of a relationship that would create a successful selection process and partnership? Consider:

- What are the charity's objectives in this partnership?
- How long are you planning to be involved for?
- Is there a dedicated volunteering manager?
- Is the charity realistic about what your involvement will achieve for them?
- How good is the charity at monitoring funding and reporting back effectively?
- Is there a conflict of interest between your company's work and clients and the charity's work?
- Does the charity have any other corporate partners, and are any of them your competitors?
- Is the charity an inspiring communicator?



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SHORTLISTING
AND
NOMINATING

POSSIBLE STAGES IN THE SELECTION PROCESS

The charity selection process can take between three and six months from research to selection. Try to be realistic about the timeframe before communicating deadlines to your stakeholders. Here are the steps to expect in the process:

- Online research/conversations with a broker*
- Application form for charities
- Meetings with charities
- Selection by charity committee or responsible business team
- Employee vote (if applicable)
- Agree partnership terms
- Launch partnership
- Interim review of partnership

**A note on brokers: you often pay for a broker service, but they do have some advantages. They'll often have established relationships with charities, which can take the strain off the selection process. Brokers have in-depth knowledge of community needs and can offer advice. And some charities only use brokers to find corporate partnerships.*



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THREE SUGGESTED ROUTES TO CHOOSING A CHARITY

1. Ask employees to nominate a charity

Pros

- It generates a wide range of responses
- It encourages employees to get involved in supporting the cause
- It can be used to re-launch a programme if momentum has waned
- It can identify possible charity champions from the outset

Cons

- Shortlisting lots of applications is time consuming
- You might get unrealistic options
- Employees can feel dejected if their charity isn't chosen
- The outcome may not fit the issues that relate to the business
- It can generate an emotional response rather than a strategic one

2. Ask employees to nominate within criteria from a charity committee



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Pros

- It reduces the number of charities to shortlist
- It creates a balance between employee engagement and a strategic approach

Cons

- The shortlisting process can still be time consuming, depending on the number of charities that fit the theme
- It may be difficult to find employees to sit on the committee from a wide range of levels and departments

3. Ask employees to vote on particular charities

Pros

- You'll already know shortlisted charities can accommodate your key skills and fit with the business strategy
- Your charity committee can evaluate how successful a partnership might be before shortlisting

Cons

- Employees could feel other charities are more deserving
- Your charity committee would need a good knowledge of charities within the theme
- It takes time to research charities within the theme



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