



ALBERTA'S PROMISE
Inspiring Partnerships for Kids



Creating a Community Involvement Program for Your Small Business

A Toolkit for Giving Back in Alberta

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Creating a Community Involvement Program for Your Small Business

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MESSAGE FROM ALBERTA'S PROMISE

MESSAGE FROM ALBERTA'S PROMISE

While Alberta's small businesses know the importance of giving back, developing a strategic community involvement program that meets business goals and community needs can be daunting. Staff management, budget monitoring, and other day-to-day demands of operating your business often leaves community involvement planning on the backburner. But in a world where social responsibility is moving from buzzword to business necessity, small businesses can't afford to get left behind.

Luckily, you might find that your business has already taken steps towards building a community involvement plan to do good in your community. This toolkit will help you put it all together.

What do we mean by community involvement? We define it as the giving of a business' time, money, goods, or services to community agencies or non-profits that improve the well-being of all, including the economic environment to do business.

NEED A HAND WITH THE TOOLKIT?

The partnership advisors at Alberta's Promise are here to help. We work with businesses to make strategic community involvement a competitive advantage. Connect with us and see how our no-fee partnership and marketing services can work for you.



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Alberta's Promise created this toolkit as a step-by-step guide to developing a strategic community involvement program for your small business. The toolkit has been divided into five steps and two activities. The steps help you identify the structure and components of your program, while the activities help you complete two core takeaways: a giving mission statement and a community involvement policy. Together, these two takeaways comprise the foundation of your community involvement program.

Getting involved in your community is a competitive advantage for your business. This toolkit can help you get ahead by giving back.

Let's get started.



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DOES DEVELOPING YOUR PROGRAM SEEM DAUNTING?

See a sample community involvement policy in **Appendix C** and use this toolkit to take one step at a time.

#IGiveBack

because my business
is a force for good

When I use my business to do good in
my community, my employees and
customers also do good.

INTRODUCTION

Doing good is good for business

Few can argue that giving is good for the community. It brings people together to achieve common goals, raises awareness of social issues, and increases the pie of resources needed to build a thriving community. But is doing good *good* for business?

According to renowned Harvard Business School professor Dr. Michael E. Porter and FSG managing director Mark R. Kramer, an effective giving program is not only good for business but *a downright competitive advantage*¹. How, you ask? Giving back, say Porter and Kramer, “can often be the most cost-effective way for a company to improve its competitive context”. When approached strategically, a business’ giving activities align giving priorities with business goals and helps strengthen the conditions for business sustainability and growth.

Philanthropy can often be the most cost-effective way for a company to improve its competitive context.

What does strategic giving look like? Many small businesses see a clear connection between the health of their organization and the health of the communities in which they do business. Supporting educational programming and mentorship for children, for instance, often contributes to a better educated workforce, while increasing community resources for families contributes to a more economically-resilient base of consumers. The more closely a company’s community involvement is linked to improving its business environment, the more economically and socially beneficial its giving will be.

The conclusion that drives this toolkit as well as the work of Alberta’s Promise is simple: When giving back supports both competitive interests and community goals, doing good is very good for business.

¹ Porter, Michael E. and Mark R. Kramer. (2002 December). *The Competitive Advantage of Corporate Philanthropy*. Harvard Business Review, <https://hbr.org/2002/12/the-competitive-advantage-of-corporate-philanthropy>.



Giving back goes a long way

There are many economic and brand-building advantages of doing good:

- ▶ People's willingness to buy, recommend, work for and invest in a company is driven **60%** by their perceptions of the company and only **40%** by their perceptions of their products².
- ▶ Businesses that make a conscious effort to be more socially responsible benefit both in terms of profits and in talent recruitment³.
- ▶ **85%** of consumers report having a more positive image of a company that is seen to make the world a better place⁴.
- ▶ **71%** of employees want to work for companies that commit to social and community concerns⁵.
- ▶ **64%** of Canadians will recommend a brand they have tried or heard about to friends and family when it is for a good cause they believe in⁶.
- ▶ Companies with high levels of employee engagement—which can be achieved through an effective giving program—outperform the stock market by **22%**, while companies with lower engagement had **28%** lower returns⁷.
- ▶ **67%** of Canadians said they would switch brands that are comparable in quality and price if the brand supports a cause they believe to be worthy⁸.

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Small (but mighty) business

As a small business, you may feel as though your community impact is just a drop in a bucket. But in a province where 95% of businesses are small businesses (Government of Alberta, 2014), your time, dollars, and effort have the potential to make a big impact. While a large company may have more to give, small businesses find strength in numbers.

This toolkit was designed with you – the small business – in mind. That said, it can also be adapted by businesses of all sizes. We know your business may already give back, and if so, we encourage you to use this toolkit to strategically tailor your community involvement program to better suit your business. If you are new to community involvement, great! We hope the toolkit inspires you to use your business for good, and empowers you to make the difference you can.

▶ GO TO STEP ONE

2. Reputation Institute, Global RepTrak® 100, 2012, http://www.nbcnews.com/id/47803248/ns/business-forbes_com/print/1/displaymode/1098/.

3. Abacus Data, 2010, <http://abacusdata.ca/wp-content/uploads/2010/11/CCSR.pdf>.

4. Gareth Chadwick, Profit with a Conscience, 2005, <http://www.independent.co.uk/environment/profit-with-a-conscience-529298.html>.

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6. Edelman Good Purpose Survey, 2012, <http://purpose.edelman.com/>.

7. AON Hewitt, Trends in Global Employee Engagement, 2011, http://www.aon.com/attachments/thought-leadership/Trends_Global_Employee_Engagement_Final.pdf.

8. Edelman Good Purpose Survey, 2012, <http://purpose.edelman.com/>.

S1

STEP ONE

Define your business goals for giving

IN THIS SECTION

Find your motivation for getting involved in the community. Doing good and giving back can improve your business reputation, engage employees, win new business, and make a difference.

QUICK TIP

Your business can decide which goals to share with employees, customers, and external stakeholders. The groupings in Question 1 are only a suggestion.

STEP ONE

Define your business goals for giving

As with any type of strategic planning, understanding the “why” behind your community involvement program is a critical first step. While there are many reasons to give back, identifying yours will build the foundation for a strong community involvement plan.

Why do you want to invest the time and effort in planning your community involvement? What do you hope to gain? The answers to these questions will guide future community involvement decisions.

► QUESTION 1

We know you have many reasons to pursue community involvement. Choose and rank your top five goals for the year ahead.

INTERNAL BUSINESS GOALS

- Shape your business reputation
- Associate your brand with a visible/important community cause/event
- Generate positive publicity and media opportunities
- Differentiate yourself from your competitors
- Win new business
- Develop and enhance relationships with customers and suppliers
- Develop relationships or community involvement partnerships with new organizations
- Improve your visibility in a new business location or community
- Foster relationships within your community (social license to operate)
- Attract and retain a happy workforce and be an employer of choice
- Engage employees and improve morale
- Develop your future workforce
- Other:

EXTERNAL (PUBLIC) BUSINESS GOALS

- Fill an important need in your community
- Make a lasting impact or legacy in the community
- Raise awareness for causes in your community
- Help employees gain new skills through volunteerism or giving
- Encourage innovation and learning
- Engage your consumers to give with you
- Partner with other businesses to support a joint cause
- Tackle issues that matter most to employees and customers
- Tackle issues that are important to your industry
- Other:

► GO TO STEP TWO



#IGiveBack

because it's important
to my employees

My employees earn a paycheque while making
a meaningful impact in our community.

S2

STEP TWO

Determine your giving priorities

IN THIS SECTION

Narrow down the causes your business wants to support. Find the logical connections between what you do, what you stand for, and what your employees and customers value.

QUICK TIP

Developing a giving program should never be a closed door affair. The more customers and employees you engage in the early planning stages of your program, the better supported and more robust your program will be.

STEP TWO

Determine your giving priorities

With over 24,000 non-profit organizations in Alberta, there are a lot of great causes your business could support. As noted by Imagine Canada, these organizations provide communities with vital services that support health, education, children's activities, animal welfare, environmental protection, and many more.

Discover the causes that matter most to your business by considering your history and business relationships, your community, your products and services, and your employee and customer affiliations.

2.1 Common causes and demographics

Take a moment to explore the possible causes and demographics your business may choose to support.

These are some of the most common community involvement causes to consider:

Arts, Culture and Humanities: organizations bring the performing arts to the public; preserve and commemorate the events, places, and cultures that created and continue to shape Canada; and promote the distribution of ideas.

Education: organizations promote learning and intellectual development from preschools through post-graduate schools and adult learning programs; they include schools for students with special needs, organizations offering vocational and technical training, libraries, literacy programs, scholarships, student organizations, and parent-teacher groups.

Research: institutes that conduct theoretical and applied research in the fields of natural science, tech, and social sciences.

Environment: organizations dedicated to reclaiming and preserving natural resources and to beautifying the world around us, ranging from recycling programs to wetlands management to garden clubs.

Animal: organizations include humane societies and SPCAs, bird and wildlife sanctuaries, fisheries, veterinary organizations, zoos, and animal-training nonprofits.

Health: organizations concerned with the body or mind; include sports organizations, hospitals, substance abuse and additional treatment programs, diseases and disease research, medical disciplines and specialty research, and mental health and crisis services.

Human Services: organizations that feed the hungry, assist crime victims and offenders, provide job training, house the homeless, help people prepare for and recover from disasters, maintain playgrounds and athletic fields, act as advocates for children, and offer programs to help youth mature into adults who contribute to society.

International: organizations that focus their efforts outside Canada; include development relief organizations, human rights advocates, peace and security nonprofits, and organizations that promote international understanding.

Public, Societal Benefit: organizations focused on civil rights and civil liberties, LGBTQ2 issues, community improvement, philanthropy and volunteerism, and voter education and registration.

Religion: organizations encompass houses of worship for the world's major religions, including Christianity—both Protestantism and Catholicism—Judaism, Islam, Buddhism, and Hinduism.

You might also want to consider the demographics that are most important to your business:

- | | |
|---|--|
| <input type="checkbox"/> Young Children 0-6 | <input type="checkbox"/> Women |
| <input type="checkbox"/> Children 7-12 | <input type="checkbox"/> Men |
| <input type="checkbox"/> Youth 13-18 | <input type="checkbox"/> Aboriginal / Metis |
| <input type="checkbox"/> Young Adults 19-25 | <input type="checkbox"/> At Risk Kids |
| <input type="checkbox"/> Adults 26-59 | <input type="checkbox"/> Persons with Disabilities |
| <input type="checkbox"/> Seniors 60+ | <input type="checkbox"/> Immigrant Groups |

2.2 Consider your business focus, products, and services

Looking at the obvious connection between your products or services and the community need comes first. What products or services do you offer? Is there a logical connection between what you sell and a specific kind of non-profit in the community? For example:

- ▶ a landscaping company that supports a non-profit that teaches kids gardening;
- ▶ a contractor that supports a daycare that needs a new playground;
- ▶ a hardware store that supports a shelter for women and children;
- ▶ a vision center that supports an association for the blind.

But what if what you do as a business doesn't align so obviously with a specific type of non-profit? For example, what if you do web design? Perhaps you could help an organization upgrade their website and help them better reach clients and potential funders online. Maybe you are a furniture company with trucks going all over the city or town. If there is a non-profit that needs things delivered or picked up, perhaps you could help.

It is not always about the money, but rather about how you can use the work that you do to support those in the community. We will explore a number of creative ways to give back in

STEP THREE.

DO YOU SUPPORT CHILDREN & YOUTH?

If your giving priorities involve children and youth, let Alberta's Promise simplify the giving process. We can help connect you with non-profits that help make Alberta a better place for kids.

Connect with us and see how our no-fee partnership and marketing services can work for you.



1-877-313-7500
info@albertaspromise.org
www.albertaspromise.org

► QUESTION 1

What are your core products and services? What are the core skills of your employees? What alignment do you see between your business and your community?

2.3 Consider your brand

What do you want your company to be known for? What is your business reputation? Think about what your brand represents and whether that leads you to any logical intersections with a non-profit. For example, if your company values safety, you could support organizations that teach road and fire safety. Or if your brand stands for innovation or creativity, then perhaps your giving program could support a non-profit that nurtures those same qualities.

► QUESTION 2

What does your brand represent? What are your business values? What alignment do you see between your business and your community?

2.4 Consider your history

Businesses grow up in communities, rarely on their own. They have connections to people, places, and causes that develop naturally. Just because some of your early community involvement might not have been strategic, that doesn't mean it wasn't important. Looking back at your giving history might shed light on relationships that are central to who you are as a company.

► QUESTION 3

What are your current or historical connections to non-profits and other organizations in your community?

2.5 Consider your customers

Talk to your customers and find out what matters to them. Engaging your customers early in your giving decisions enhances your business reputation for community involvement, builds excitement among customers even before you start giving, and helps your business better understand what is most important to one of your core audiences.

▶ QUESTION 4

Who are your customers and how can you support their demographic? Consider their age, gender, ethnicity, occupation, family status, and community.

▶ QUESTION 5

Referring to the list of causes in **STEP 2.1, what causes and demographics do your customers value and support? How would they like your business to make a difference?**

2.6 Consider your employees

Your employees are the ones who will take inspiration and be motivated by your community involvement program. Involving them in the decision-making process will ensure that your program is supported by and meaningful to the people who will be managing it and taking pride in its success.

▶ QUESTION 6

Who are your employees and how can you support their demographic? Consider their age, gender, ethnicity, occupation, family status, and community.

QUICK TIP

If you don't know what your customers support, ask. Do a survey or hold a contest to get their feedback.

Consider a free survey tool like SurveyMonkey:

<https://www.surveymonkey.com/>.

QUICK TIP

Be sure to consult with both employees and senior leaders in your organization. The consultation process is a great opportunity to take pride in your commitment to the community. It's also a great opportunity to engage employees and have them take ownership over the decision.

Gather input through surveys, staff meetings, or suggestion boxes, and make sure you close the loop by reporting back the results.

► QUESTION 7

Referring to the list of causes in **STEP 2.1**, what causes and demographics do your employees and their families value and support within and outside working hours? How do they want the company to make a difference?

2.7 Consider your business locations

Strategic giving is often tied to the communities and regions where you do business. Where do you want to make an impact and what are the unique needs of your community?

► QUESTION 8

What geographic area(s) do you want to support?

- Your immediate community
- Your immediate region
- Communities where your employees live
- Communities where your customers live
- Communities where you do business
- Communities selected based on need
- Alberta-wide where opportunities arise

► QUESTION 9

What issues or needs are present in your selected geographic area(s)? (For example, low high school completion rates or lack of programming for new immigrants.)

2.8 Consider what you won't support

Sometimes it's just as important to be clear about what your organization does not support as what it does. Clarity at the start will help you make giving decisions that are consistent and aligned with your giving goals. Are there certain types of non-profits that aren't in line with what you do or what you believe?

All of this is important to know internally, but your organization should decide whether to make this information public in your community involvement policy. Doing so may reduce the number of partnership requests that do not fit within your priorities.

► QUESTION 10

What causes or activities are you not prepared to support? A few common entries are listed below to give you a starting point.

- Organizations operating outside of your core business communities
- Charitable groups that are not registered with the Canada Revenue Agency
- Service groups
- Professional or technical associations
- Political groups
- Faith-based groups
- Grant-making foundations
- Third-party organizations raising funds for charity
- Community or goodwill advertising
- Publications
- Film, video and television productions
- Individuals
- Other:

► GO TO ACTIVITY ONE

A1

ACTIVITY ONE

Write your giving mission statement

IN THIS SECTION

Capture your giving goals and priorities. Your mission statement should tell your employees, customers, and community about the causes you support and why.

ACTIVITY ONE

Write your giving mission statement

Your company's giving priorities can be captured in a mission statement that concisely describes the goals and giving areas of your program. The mission statement can be shared publicly on your website to tell your employees, customers, and stakeholders that your company gives back.

Here are sample giving mission statements to inspire you:

- ▶ UFA believes that a true co-operative is more than just business. It's about giving back to our community, investing in our youth and supporting our agriculture industry. We believe that focusing our time, energy and resources toward these three key areas helps make our community a better place—for now and for generations to come.
—**United Farmers of Alberta (UFA)**
- ▶ We're striving to ensure the communities where we live and work are stronger and better off as a result of us being there. One of the ways we do this is through our community investment program, where we look to create shared value through our partnerships with community organizations. Working together to make a positive difference is core to our community investment strategy. We concentrate our efforts in three focus areas: learning, safety and well-being, and sustainable communities. We support a wide range of organizations that are focused on the needs that matter most to the local community.
—**Cenovus**
- ▶ It takes a village... 10% of our bottom line goes to supporting arts & community.
—**Village Brewery**
- ▶ Strong communities provide our neighbors with a great place to live, work, and play. Across Alberta, ATB is known for playing an active role in the community. Last year, we contributed \$[.] million in donations, \$[.] in sponsorships and \$[.] in fundraising to over [.] Alberta charities. We look for opportunities to help strengthen communities by making it our business to know what is important to the communities where we work and live.
—**Alberta Treasury Branch (ATB)**

Now it's your turn.

Use the questions below to develop a simple giving mission statement for your small business.

▶ QUESTION 1

Review your answers from **STEP 2.3**. Summarize the brand values that will drive your community involvement.

e.g., We are a construction company that values employee and customer safety.

▶ QUESTION 2

Based on the geographic area(s) you identified in **STEP 2.7**, list the specific areas or communities your business will support.

e.g., We invest in Grande Prairie communities...

▶ QUESTION 3

Using the causes, demographics, and other considerations from **STEP TWO**, outline what your business will support. Be sure to be specific.

e.g., ...to support safety education in schools.

QUICK TIP

Take into consideration business products, brand values, historical connections, customer and employee viewpoints, and issues affecting your selected communities.



#IGiveBack because giving is in my business DNA

Good business is making an investment
in the people and communities that
help my business grow.

S3

STEP THREE

Identify your resources

IN THIS SECTION

Outline what your business has to give. Your community involvement should have a set budget and pool of financial, in-kind, and volunteer resources .

STEP THREE

Identify your resources

Like any business activity, your community involvement program must be tied to a set budget and pool of resources, whether that means staff time, financial support, or in-kind goods and services. Without these limits, your program runs the risk of becoming costly and unsustainable. Being clear about what you are able to give and how it relates to your overall giving strategy will help you narrow your program’s focus and clearly articulate your giving resources to employees, customers, and community groups.

3.1 Your giving resources

Getting involved in your community is never a one-size-fits-all approach. While giving money remains a popular option, there are many other creative ways to give back and make an impact. Chances are, your business is brimming with resources to give. Reflect on your business goals for giving and on your giving priorities as you identify your community involvement resources.

QUICK TIP

It is not always about the money, but rather about how you can use the work that you do to support those in the community.

► QUESTION 1

What resources are you already giving and what resources can you commit to your community involvement program?

RESOURCE	GIVING NOW	COULD GIVE
Funding: Ability to fund programs, services, or events		
Issue a cheque		
Match employee gifts		
Match community fundraising		
Donate where employees volunteer (e.g., <i>Dollars for Doers</i>)		
Support employee giving campaigns (e.g., casual dress days)		
Host events for charity / add charitable component to existing event		
Give awards or scholarships		
Donate percentage of sales proceeds		
Sponsor community events		

-resources continued on next page-

QUICK TIP

Did you know that sponsorships and charitable contributions are not the same thing? Find out the difference in **Appendix B**.

RESOURCE	GIVING NOW	COULD GIVE
Employee Time: Ability to contribute volunteer hours		
Offer paid employee volunteering		
Offer unpaid employee volunteering		
Coordinate team-building events in partnership with a non-profit (e.g., employees serve lunch at a homeless shelter)		
Sponsor an annual employee volunteering day		
Employee Expertise: Ability to provide expert knowledge		
Donate pro bono services to grow your client list (e.g., lend the skills of your accountant)		
Promote new opportunities for employees to expand their skill-sets		
Products: Ability to contribute products and supplies		
Donate in-kind goods		
Launch a new product in partnership with a non-profit organization		
Services: Ability to contribute services		
Donate in-kind services and collect testimonials (e.g., a company that designs websites would donate the service at no cost)		
Facilities and Equipment: Ability to provide access to facilities and equipment		
Donate the use of your meeting spaces and kitchen facilities		
Donate the use of company resources (e.g., photocopier, printer)		
Supply Chain Contacts: Ability to provide access to discounted supplies		
Extend your purchasing power to a non-profit organization		
Access to Customers: Ability to share information with customers		
Feature a non-profit in your communication with customers		
Convening Power: Ability to rally people to support a cause		
Collect donations of goods		
Feature a non-profit organization at your business or event		
Branding Power: Ability to raise the profile of a community organization through your brand		
Create a joint advertising or marketing campaign		
Co-brand on an event or project with a non-profit organization		
Other		

QUICK TIP

Many businesses create policies that allow employees to get involved in their community. Whatever policies your business puts in place should be communicated and applied consistently.

QUESTION 2

What kind of commitments are you looking to make? For example, are you looking to create a long-term partnership with a non-profit organization in your community? Would you prefer to sponsor a one-time community event? Both?

QUICK TIP

Does a rigid giving budget make you uncomfortable? Adopt a flexible giving strategy that is tied to your business earnings as a percentage of your profits.

Imagine Canada® Caring Companies are committed to donating a minimum of 1% of pre-tax profit to community organizations.

Do you want to be a nationally-recognized Caring Company? Learn more at <http://www.imaginecanada.ca/our-programs/caring-company-program>.

▶ QUESTION 3

Summarize the budget and amount of resources to be allocated to your community involvement program annually.

	CAPITAL	PRODUCTS	EMPLOYEE TIME/EXPERTISE	OTHER	TOTAL
MONTHLY BUDGET					
YEARLY BUDGET					

▶ GO TO STEP FOUR



#IGiveBack

even in tough
economic times

My company finds creative ways to give
back even when times are tough.

S4

STEP FOUR

Select your non-profit partners

IN THIS SECTION

Choose the organizations you wish to support. Your decision can be made independently or with the help of Alberta's Promise.

QUICK TIP

If a tax receipt is an important consideration when choosing your non-profit partner, you can confirm that an organization is a registered charity by visiting Imagine Canada's Charity Focus website at www.charityfocus.ca or the Canada Revenue Agency (CRA) site at www.cra-arc.gc.ca. You can also call the CRA's Charities Directorate at 1.800.267.2384. Only registered charities have a charitable registration number.

STEP FOUR

Select your non-profit partners

There are thousands of impactful non-profit organizations in Alberta. Selecting your partner(s) can be done on your own or with the assistance of Alberta's Promise.

4.A Independent Selection

Does your business have the connections or the manpower to forge partnerships with non-profit organizations? You can then make your selection through strategic decision or an open application process.

Strategic Decision

Your business may be able to identify non-profit organizations to support based on your past community involvement, relationships, and employee or customer affiliations. If you know the causes you want to support but don't have a non-profit in mind, do some online research to find an organization that aligns with your giving goals, priorities, and resources.

Write your chosen non-profit partners below.

Open Application Process

If your business is seeking new partnerships or community involvement opportunities, an open application process can expand your reach beyond your current network. The process also gives you a chance to visibly connect with non-profits, advertise your giving priorities, and engage with customers and employees in the decision.

Keep in mind that this process is time intensive and requires the creation of application guidelines and selection criteria. Go to **Appendix A** for more information on structuring your open application process.

4.B Selection with the help of Alberta's Promise

Are your giving priorities focused on children and youth? Alberta's Promise can help with selecting your non-profit partners. See how our no-fee partnership and marketing services can streamline the partner selection process and help your business build your community while building your brand.

Nomination list

Let Alberta's Promise do the work for you. We can save you time by connecting you to non-profit organizations suited to your giving priorities and resources. We will nominate a list of non-profits that fit your criteria, give you time to select your partner(s), and make the initial introductions.

Give us a call at 1-866-313-7500 or email us at info@albertaspromise.org to learn more about our no-fee partnership and marketing services. You can also find more information on our website at www.albertaspromise.org.

Selection through Open Application Process

Alberta's Promise can conduct an open application process on your behalf and give you a list of qualified non-profit applicants that match your business' giving priorities and resources. Give us a call at 1-866-313-7500 or email us at info@albertaspromise.org to get started.

NEED A HAND SELECTING PARTNERS?

Alberta's Promise is the connector that brings businesses, non-profits, and communities together to build meaningful partnerships for kids. Whether donors provide financial gifts, in-kind goods and services, or volunteer hours, we help donors give creatively and strike the right balance between making an impact in the community and making sense for business.

Connect with us and see how our no-fee partnership and marketing services can work for you.



1-877-313-7500
info@albertaspromise.org
www.albertaspromise.org

▶ GO TO ACTIVITY TWO

Get to know your non-profit partner

When selecting a non-profit partner, it is important to understand the organization's purpose, impact, and partnership goals.

For help in identifying and communicating these components, non-profits can refer to the **Building Corporate Relationships** toolkit from Alberta Culture.

<http://culture.alberta.ca/community/resources-and-links/tools/pdf/AlbertaCulture-Toolkit.pdf>



A2

ACTIVITY TWO

Write your community involvement policy

IN THIS SECTION

Capture your giving goals and priorities.

Your mission statement should tell your employees, customers, and community about the causes you support and why.

ACTIVITY TWO

Write your community involvement policy

If your business gives back and does good, you should make your commitment to the community public. Whether you post your giving policy on your website or in your staff room, the policy should be visible to your customers, your employees, and the non-profit organizations that might want to partner with you. A public policy will also open you up to media promotion and help you forge the kind of partnerships that truly fit with your giving priorities.

Here is a sample community involvement policy from Calgary Co-op:

Calgary Co-op's total community investment was \$3.9 million in 2015. This includes in-kind donations, funding for community programs and charitable donations.

One of our areas of giving is through the Co-op Community Foundation. Our primary focus is food security. We are helping to provide easy access to affordable, healthy food and proper nutritional habits to local families who are struggling to provide this basic need.

With a desire to impact food security in our community we have three areas of focus.

- ▶ Providing Food to Those in Need – working with local area food banks and other charities we provide approximately \$2.6 million in food annually.
- ▶ Nutrition and Education – working with local charities to help educate our community on affordable and nutritious food options. To include cooking classes with our in store executive chefs.
- ▶ Food Sustainability – invest in programs that help provide sustainable food solutions for future generations.

— Calgary Co-op, 2016

While every community involvement policy is different, consider including these four elements in yours:

1. Your giving mission statement;
2. The resources you have to give;
3. A listing of the organizations that you support OR a description of the selection process; and
4. A description of past community involvement, whether a regular commitment or a one-time contribution.

▶ **QUESTION 1**

Recap your giving mission statement from **ACTIVITY ONE**.

e.g., We are a construction company that values employee and customer safety. We invest in Grande Prairie communities to support safety education in schools. Our goal is to improve the wellbeing of families in our communities and make sure everyone gets home safe.

▶ **QUESTION 2**

Recap your selected resources from **STEP THREE**.

e.g., Our employees volunteer their time to teach high school students about the importance of wearing safety gear and following proper protocol in shop class.

▶ **QUESTION 3**

Recap your selected organizations or selection process from **STEP FOUR**.

e.g., We have partnered with ABC High School to provide safety training at the start of each semester. Other interested high schools can apply for this program by contacting John at john@company.ca.

▶ **QUESTION 4**

Summarize your past community involvement in a few lines. You may wish to reference the resources you listed under “Already Giving” in **STEP THREE**.

e.g., Our company has been offering safety education to students since we were established in 2012. We also sponsored the Run and Walk for Workplace Safety in 2015 to raise awareness of occupational health and safety practices. We remain committed to teaching the importance of safety in our community and look forward to expanding our program in years to come.

QUICK TIP

Build your reputation by highlighting your past or current giving commitments. Dedicate a section on your website to promote your partnerships and highlight those initiatives that may fall outside your regular community involvement activities (e.g., scholarships for employees’ children, one-off food drives, etc.).

QUICK TIP

Your business may choose to publicly list the causes your organization does not support. Doing so may reduce the number of partnership requests that do not fit within your priorities.

► QUESTION 5

Now put it all together. Write your complete community involvement policy below.

For a sample policy, please see **Appendix C**.

► GO TO STEP FIVE



#IGiveBack

because it makes my
business stand out

My customers value that their purchases
do good in the community.

S5

STEP FIVE

Manage and evaluate your program

IN THIS SECTION

Regularly evaluate and promote your giving strategy. Ensure your community involvement program remains relevant to your business and to your community.

STEP FIVE

Manage and evaluate your program

Once you have your community involvement program running, it's important to ensure the program continues to meet your goals for giving. Take some time to evaluate your program regularly and communicate your success stories with employees, customers, and your partners.

5.1 Evaluate your community involvement program

Your community involvement program is just like any other business activity and expense: it must be monitored regularly to ensure it continues to be a good business decision. In **STEP ONE** of this toolkit, you had identified your business goals for giving. It is important that you pause at least once a year to reflect on the outcomes and impacts of your community involvement program to see if the program continues to meet your goals.

Your evaluation may involve input from your employees, your non-profit partners, and even your customers and other stakeholders. Identify what worked, what could be improved, and whether new community priorities need to come first.

Consider the following questions as you assess your community involvement program:

► QUESTION 1

How is your community involvement program meeting your chosen objectives? Are you staying within budget?

▶ **QUESTION 2**

What concerns have arisen from employees, customers, or community organizations about your program? How could the program be improved to better support your business objectives?

▶ **QUESTION 3**

Which activities or partnerships have contributed most to your business objectives? How will this affect your giving priorities?

QUICK TIP

An important part of evaluating your community involvement program is reflecting on the mutual goals of specific partnerships. Make sure you touch base with your non-profit partners regularly to discuss how the partnership is meeting your objectives.

5.2 Tell your stories

Realize the full benefits of your community involvement program by promoting your success stories. When you share how your business is a force for good in your community, your employees will gain a new sense of pride in working for you, your customers will have a better opinion of your brand, and even local media may take notice.

Communicating actively and repeatedly about your giving efforts must be an integral part of your program. Figure out who needs to know, what they need to know, and how you plan on telling them.

▶ **QUESTION 4**

What audiences and stakeholders need to know about your community involvement?

- | | |
|--|--|
| <input type="checkbox"/> Employees | <input type="checkbox"/> Town/Government |
| <input type="checkbox"/> Senior Management | <input type="checkbox"/> Media |
| <input type="checkbox"/> Customers | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Suppliers | |

NEED A HAND PROMOTING YOURSELF?

Partner with Alberta's Promise to build your brand while you build your community. Alberta's Promise can help tell your story, share your successes through our website and social media.

Contact us to learn more.



1-877-313-7500
info@albertaspromise.org
www.albertaspromise.org

► QUESTION 5

What communication channels do you use?

Consider how you plan to share community involvement news with audiences. Your business may already use established channels for both internal and external communications. Consider leveraging these channels to promote your corporate giving.

For example, you may use a monthly newsletter to inform customers of upcoming promotions, or send out a weekly memo to employees containing up-to-date business priorities or sales figures. Videos, photos, and short paragraphs showcasing your community involvement can be easily integrated into these existing channels.

Consider the following communication channels:

Your Business Channels

- Website
- Social media (e.g., Facebook, Twitter, Instagram, Youtube)
- Company blog
- Brochures and printed materials
- Customer newsletter
- Employee memo

Non-Profit Partner Channels

- Website
- Social media
- Blog
- Annual report
- Brochures and printed materials
- Newsletter

Alberta's Promise Channels

- Website story
- Social media promotion

Other Channels

- Community newspapers
- Community radio / TV
- Posters in visible locations

Don't forget to ask your non-profit partners to spread the word of your community involvement, too! Whether they display your logo on their website, nominate your business for a philanthropy award, or mention you through social media and events, these small acts of recognition will help build your business reputation.

► QUESTION 6

What are your key messages?

What messaging should be communicated to your audiences and stakeholders? Naturally, you'll want to share how your program has made a difference in the community.

Using simple but powerful language and visuals, explain what your company did, how you did it, and how it impacted your community, your employees, and your business. Remember that storytelling is the most powerful tool you can use to communicate your successes: a well-written story with an emotional appeal, a video with a compelling narrative, or even a simple social media post with a powerful photo will create a lasting impression for your audiences.

WANT TO TELL A GREAT STORY?

Alberta's Promise can help. We offer no-fee marketing services to promote our partners.

Contact us to learn more.



1-877-313-7500
info@albertaspromise.org
www.albertaspromise.org

► GO TO CONCLUSION

#IGiveBack

to pay it forward

I have many people to thank for my success. Giving back helps me pave the way for others.



CONCLUSION

Small businesses like yours have the power to make a big difference in Alberta. From employee manpower to gently used office equipment to storage space, every business has something to offer a non-profit that makes our communities better. It is up to your business to discover your giving potential, and this toolkit has hopefully helped you do just that.

You have identified your goals for giving, selected the causes that matter most to your business, and crafted a succinct giving mission statement. You have defined what you are able to give, selected your non-profit partners, and solidified the good you do with your community involvement policy. Now you are well on your way to manage a strong community involvement program that serves your community and benefits your small business.

If you have decided to focus your giving on children and youth, Alberta's Promise wants to help. Let us support your community involvement program and tell the world about the difference you make. You can also grow your impact by referring other small businesses to become Alberta's Promise partners and continue building a better Alberta for families. Together, we can strengthen our communities while making Alberta a great place to do business.

Appendix A

Developing guidelines for an Open Application Process

Managing community requests for your community involvement program can easily become a full time job. By having a defined application process, you can ensure that your organization and your employees are prepared to manage what could be a large number of applications.

When issuing a call for applications, communicate your community involvement policy and the details of your program to help non-profit applicants better tailor their submissions.

Use these questions to help determine your open application process:

▶ QUESTION 1

How often do you want to receive and manage applications?

- Throughout the year
- On a quarterly basis (e.g., February 1st, May 1st, August 1st, and November 1st)
- On a bi-annual basis (e.g., March 1st and October 1st)
- On an annual basis (e.g., March 1st)
- Every 'x' number of years (e.g., March 1st and recommended no more than 3 years apart)

▶ QUESTION 2

What type of information do you need in your application?

Consider the following:

- ▶ Overview of the non-profit applicant and difference they make in the community
- ▶ Resources they need (e.g., volunteer time or donated office equipment)
- ▶ Impact of your investment
- ▶ Other benefits of the partnership

QUICK TIP

For great examples of giving program guidelines, see:

Alberta Treasury Branch:
<http://www.atb.com/community/Pages/sponsorships-and-donations.aspx>

Calgary Co-Op:
<http://www.calgarycoop.com/community/community-foundation/>

QUICK TIP

Open application processes can also be structured to minimize the disruption to your business. It is up to your organization how often you to accept submissions.

▶ QUESTION 3

Will employees be required to submit their requests through the same application process as external organizations? Can employees endorse or submit requests on behalf of community organizations? How will priority be assigned?

▶ QUESTION 4

How quickly will you announce your decisions? How will you notify applicants?

▶ QUESTION 5

Who in your organization will be designated to manage the open application process? Is it an individual, a department, a committee? Who is required to provide final approval before resources are officially committed?

QUICK TIP

Consider crafting standard messages for responding to applicants. These include messaging for letters, emails, or telephone scripts.

▶ GO BACK TO STEP FOUR

Appendix B

Sponsorship vs. charitable contribution: What's the difference?

	Sponsorship	Charitable contribution
Budget source	Typically from marketing, advertising, or communications budgets.	From charitable donations or philanthropy budgets.
Publicity	Highly public	Usually little fanfare
Business accounting	Written off as a full business expense, like promotional printing expenses or media placement expenses.	Write-off is limited to 75% of net income. (This limit was increased in 1997 from 20%, so accounting/tax considerations are less likely to influence the way a corporation designates funding of a nonprofit organization.
Business objectives	Generally, to raise the profile of the corporation; to sell more products/services; to increase positive awareness in markets and among stakeholders (customers, potential customers, geographic community)	To be a good corporate citizen; to enhance the corporate image with closest stakeholders (i.e. key employees, shareholders, suppliers).
What businesses want in return	Except in the case of very small sponsorships, banners and a small acknowledgement on a program are no longer sufficient. Today, corporations look for everything from employee involvement to the opportunity to mix and mingle with other top level executives at other sponsor corporations. The best relationships are not 'one off', but develop and increase in value to both sponsorship partners over a number of years.	Appropriate gratitude; confidence that the charitable dollars are used responsibly.
Recipients	Events; teams; arts or cultural organizations, projects, programs. A cause is sometimes associated with the project. Increasingly educational institutions and other public sector organizations (parks, libraries, etc.) are seeking sponsorship.	Larger donations are typically cause-related (education, health, diseases, disasters, environmental), but can also be cultural, artistic, or sports related. At times funding is specifically designated for a project or program; at times it is provided for operating budgets.
Where most dollars go	One of the fastest growth areas in sponsorship today is cause-related organizations. For now, however, sports (where sponsorship started) get over 50%.	Education, social services, and the health sector are reported to get close to 75% of charitable donations.

Source: https://charityvillage.com/Content.aspx?topic=sponsorship_or_charitable_contribution_what_s_in_a_name#.V-q97E0RLRY

Appendix C

Sample Community Involvement Policy

In 2016, KCL Cattle Company Ltd. used a draft version of this toolkit to develop their community involvement strategy. Many thanks to Karleen and her family for allowing us to share their work. The following are direct excerpts from the company's community involvement policy.

KCL's giving mission statement:

"As stewards of this environment, members of a community, and producers of food KCL is committed to helping these areas thrive. We believe that we can use KCL's skills, knowledge, power, and resources to create a better world for ourselves and our future generations. KCL is a company found in a strong and proud industry and is made up of a skilled and hard-working workforce and a passionate family. As a dynamic team with a lot to offer, KCL is committed to extending these offerings to our community"

Purpose of Policy

This program is designed to better outline the motivations, goals, processes, and guidelines for KCL's corporate social responsibility initiatives. It is intended to be of use to all stakeholders of KCL.

Stakeholders

It is best to divide KCL into three groups: the business, the staff, and the family. Each of these groups play a large part in KCL but each are unique and diverse in their goals, values, and resources/capabilities. By separating them we are able to better define and make sense of our past, current, and future initiatives while also serving the community in the most effective way. This also ensures that each group's goal is being met equally without partiality.

Goals for Giving

Clearly defining the motivations behind this program is a building block to facilitating all other steps. This answers questions such as: Why are we investing time in this? And what do we hope to gain?

Giving Priorities & Activities

Giving priorities give direction to the possible issues, causes, and activities that KCL and the three groups are to focus on. This is not a definitive list that has no room for movement: it is meant to simply be a guideline. This helps better define activities while providing direction for future initiatives. It is important to list these so not to get lost in the large and wide variety of non-profit organizations and causes.

This section lists the core reasons or values of the group and how that translates into needs in the community. Some activities may correspond with multiple reasons or values.

An itemized list would follow.

General Guidelines for Activities

Location: Although there are many opportunities to give throughout the world the purpose of this program is to give back to OUR community. With that said, there is to be an emphasis on local non-profits and activities. We believe this will better serve our goals. This is not a hard rule and will be evaluated on a case by case basis. For example, we may focus more of our resources outside of the community when a pressing matter (ex. High River flood) is presented that year.

Type: KCL opens their program to a variety of types of activities such as financial donations, sponsorships, in-kind donations, and volunteering. This is to be determined based on need, skill set, and resources.

Non-Profit Partners: There is a list of approved non-profit partners (found in appendix A), any outside of this list must be approved by management. It is important to evaluate the values of every non-profit partner to ensure they do not conflict with the values of KCL.

Resources and Budget

- ▶ Financial resources: Donations/Expenses
- ▶ Employee time
- ▶ Employee expertise
- ▶ Products
- ▶ Access to consumers
- ▶ Convening power and branding power

Policy

This written policy is given to each employee for them to read and sign. This is intended to provide them with guidelines and “do’s and don’ts” of the program. This provides accountability and helps to avoid abuse of the program.

Evaluating

KCL will pause and reflect on the program once a year. This will be an evaluation of the outcome and impacts of the program, and whether they are meeting the goals we have set out.

Telling Our Story

An important part of reaching the goals and objectives of this program is communication. The KCL team must communicate with all stakeholders effectively.

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THANKS

THANKS

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The development of this toolkit was inspired by the many businesses that are proud partners of Alberta's Promise. Thank you for continuing to support children and youth in your community. We hope that you find this toolkit useful when planning your community involvement, and we would love to hear back from you as you develop your own program.

And last but not least, a special thank you to the outstanding team at Alberta's Promise for making this toolkit a reality:

Judy Eng-Hum Executive Director	Karen Whiteman Laura Burton-Kopustas Cristina Cernucan Adison Wiberg Ashlee Moyen
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ABOUT ALBERTA'S PROMISE

Alberta's Promise makes community involvement easy.

Our team helps businesses give time, money, or goods and services to non-profits that serve children and youth. We do not raise funds but rather inspire all sectors of the economy to support programs and services for kids. Our no-fee partnership and marketing services help businesses give strategically so they can build their brand while building their community.

Businesses across the province work with Alberta's Promise to reach their community involvement goals. We help our partners:

1. Identify the causes they want to support;
2. Create partnerships with agencies that serve Alberta's youth; and
3. Celebrate and promote partnerships through media and events.

Learn more about us at www.albertaspromise.org, and connect with us and see how our no-fee services can work for you.



ALBERTA'S PROMISE
Inspiring Partnerships for Kids

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