



NOT BUSINESS AS USUAL

- PARTNERSHIPS BETWEEN CSOS AND BUSINESSES

Input and learnings from 32 businesses, CSOs and local partners

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Cover:

CARE's savings and loans groups help rural communities improve the skills to manage their money effectively and make better investments. No one is too poor to save - members in groups like this one can save \$58 a year.

Photo @ Jon Spaul/CARE/Uganda

CONTENTS

| | |
|---|-----------|
| Preface | 4 |
| Executive summary | 6 |
| Introduction | 8 |
| Process and inputs | 11 |
| Defining a partnership | 12 |
| Literature review | 15 |
| Learning from others - good practice | 22 |
| Case partner projects | 33 |
| Five key conclusions | 42 |
| Contributors | 48 |
| Methodology | 50 |
| References | 55 |

1 - PREFACE

Strategic partnerships between Civil Society Organisations (CSO) and businesses enhance the possibility of addressing global challenges, such as poverty, and creating positive impacts globally as well as bring-ing benefits to the partners. The Red Cross has many years of experience in cooperating with businesses and recognising the potential of sustainable business in addressing global challenges, and Danish Red Cross prioritises exploring opportunities for strategic partnerships with visionary business. Therefore, Danish Red Cross initiated the project “Future Partnerships Models for Strategic CSR” with the purpose of developing a partnership model for the benefit of businesses and CSOs.

DANIDA’s CSR fund with the purpose of strengthening businesses’ corporate social responsibility and fairtrade has made it possible for Danish Red Cross to further explore the potential within CSO-business partnerships. We would like to acknowledge how the support from DANIDA has enabled us to facilitate a joint process for CSOs and businesses to develop a sustainable framework for future strategic partner-ships.

The present Learning Report is the first output in the process of delivering a sound and viable framework and instructive model for how to develop, build and sustain successful partnerships between CSOs and businesses. The report provides a broad and representative outline of global experiences with instructive models for CSO-business partnerships. In order to do so, the learning report will identify and analyse insights from

various sources from the business sector, the CSO sector, the professional field and the academic field.

Due to Deloitte’s many years of experience in concept development within CSR and their experience with strategic partnerships, Danish Red Cross commissioned Deloitte Sustainability to facilitate and conceptually develop the project process to ensure progress and results.

Danish Red Cross would like to extend a sincere thank you to the organisations and businesses, CARE Denmark, Coop, Sunripe, Grundfos and Kenya Red Cross who have a significant role as Case Partners in our CSR project. By participating as Case Partners, CARE Denmark, Coop, Sunripe, Grundfos and Kenya Red Cross take part in developing a sustainable model for strategic CSR and they have provided invaluable input to the Learning Report. Your engagement and dedication is an inspiration for the project.



Anders Ladekarl

Secretary General, Danish Red Cross



Dignitaries visiting a Lifelink installation in Kenya.
Photo © by Jakob Dahl

2 - EXECUTIVE SUMMARY

The world faces significant and increasingly interconnected challenges such as poverty, climate change, pollution and population growth. Solutions to these challenges require civil society organisations (CSOs) and businesses to join forces in strategic partnerships despite differences in approaches, resources and competencies. Doing so will not only benefit society at large but also the CSOs and businesses themselves. CSOs can obtain access to new technology, competencies, strengthen the impact of projects and improve cost-effectiveness. Businesses can accommodate rising public expectations of corporate responsibility, improve stakeholder engagement, mitigate supply chain risks and gain access to new markets.

Nevertheless, the challenges of partnerships are also many, which is partly due to historic roles and misconceptions and partly due to different cultures, drivers and working procedures. Consequently, partnerships often do not achieve their full potential, leading to anxiety about entering into them. Despite this, the general conclusion seems to be that partnerships are an invaluable part of solving the world's challenges.

The question is thus: how do businesses and CSOs overcome these challenges and engage in value-adding strategic partnerships? Or rather: how do we create the CSO-business partnerships of the future? This is the objective of the project Future partnerships models for strategic CSR initiated by Danish Red Cross and funded by DANIDA.

Strategic partnerships can be identified in two categories, transactional and transformational. The focus of this report is on the transformational partnership. This is characterised by the partners utilising their core competencies, joint value creation and a joint definition of purpose where the way in which the parties work and create value is altered due to the partnership. It is a case of 'not business as usual'.

As the report will show, a multitude of guidelines, frameworks and models have already been developed to assist with this. However, none of them covers all the challenges, associated risks and stages that a partnership goes through. This reveals a need for developing approachable and practical insights on actual do's and don'ts when developing and implementing a strategic partnership. This will be the focus of the next phase of the project.

This report highlights the challenges and key learnings linked to engaging in transformational partnerships. The key learnings are based on review of academic literature, 10 existing partnership models, and frameworks and complemented by international good cases, input of more than 30 CSOs, businesses and their local organisations. As such the key learnings build on an identification of key challenges, risks and recommendations outlined by literature, tested with and backed by the empirical experience and input from practitioners in the field.

The key learnings are structured around seven core elements forming the evaluation framework for a successful partnership, and which has been validated through the dialogue with practitioners; Strategic fit, Project structure, Roles and responsibilities, Finance, Implementation, Communication and Monitoring and evaluation.

This investigative approach to exploring the success of transformative partnerships has led to five overall conclusions:

Transformational partnerships are not business as usual for any of the partners involved. They are based on an innovative process and should be treated as such with formulation of strategic fit, shared objective, governance structures, operating processes and organisational anchoring while respecting the unique and essential competencies of the other partners.

Local partners and beneficiaries must be continuously involved and as early on in the process as possible. This involvement will increase the positive impact, ensure more efficient implementation, and enhance the engagement and capacity building with local communities.

Needs of the intended beneficiaries must be assessed and agreed upon. Transformational partnerships are often developed based on what the business wants or what is perceived as obtainable. This approach leads to fewer positive impacts for the beneficiaries than could potentially be achieved.

A transformational partnership should be based on an assessment of the actual needs of the intended beneficiaries or receivers.

The partners must get resources and finance right. The question of resources can be awkward but must be tackled upfront. Partnership budgets are often structured from whatever amount the partners are willing to invest. In transformational partnerships there are often high costs related to project management and administration for all parties involved. This is a great challenge that needs to be realistically and transparently addressed in the budgetary discussions from both sides.

Management buy-in and involvement should be ensured. There is a constant pressure on the people working with transformational partnerships to document and prove the values of the partnership to internal stakeholders and constantly communicate the benefits. This takes a lot of resources away from the actual partnership to internal activities and stakeholder management. Management buy-in must be obtained and consistently communicated within the organisation. Further, personal relations building on on-going and trusting communication are essential, and resources should be set aside for obtaining this. Finally, transformational partnerships should be staffed with people experienced in business development, project management and with commercial insight.

3 - INTRODUCTION

The world is facing significant and increasingly interconnected challenges such as poverty, climate change, pollution and population growth. These challenges cross not only geographical boundaries, but also the traditional political and sectorial divides. Their impacts are global and so must their solutions be. No single player is capable of addressing them alone.

New perspectives, new solutions and new approaches are needed. Players from the public and private sectors, i.e. businesses, and civil society must join forces despite potential differences in approaches, resources and competencies.

This insight has been around for some time. It is for example reflected in high-level events and debates where an increasing number of scholars, politicians, practitioners and professionals advocate for businesses and CSOs to engage in such partnerships. A good example of this is discussions taking place at the Rio+20 conference¹ and the following development of the Sustainable Development Goals where partnerships were identified as being one of the five big, transformative shifts needed². The argument goes that by working together the sum of positive impacts will be greater than what could have been achieved individually, as well as bring about a number of benefits for the partners such as access to new and valuable knowledge, people, channels and networks. CSOs can furthermore obtain access to new technology, products, competencies and services that can support their activities in the field as well as strengthen the impact of projects through cross-purposing and shared

value and improve cost-effectiveness of their activities through methods defined in collaboration with partnering businesses. Businesses can, on the other hand, accommodate rising public expectations of corporate responsibility and improve their engagement and dialogue with various stakeholders. They can mitigate supply chain risks, gain access to new markets, and improve social, environmental and financial return on investments. Most importantly, by joining forces and addressing complex challenges the positive impacts for the beneficiaries, that being local communities, the environment or needing individuals, will be greater (Berger, Cunningham & Drumwright 2004).

CSO-business partnerships thus represent a great potential for addressing the global, complex challenges that the world is faced with, for making real positive impacts for people and for driving sustainable growth.

Nevertheless, the challenges of partnerships are also many as well as extensively researched and argued in the literature. Businesses are often very different from CSOs and historically the relationship has often been infused by conflicts and mistrust (Gjerdrum Pedersen & Pedersen 2013). The CSOs and businesses are organised differently; they have different motives, cultures and working procedures and partnerships across these two 'worlds' may put significant strain on internal resources and governance structures. Consequently, businesses and CSOs are often anxious about engaging in complex and strategic partnerships. Despite these challenges, the general conclusion seems

to be that partnerships are an invaluable part of solving the complex and global challenges that the world is faced with. The question is thus: how do businesses and CSOs overcome these challenges and engage in value-adding strategic partnerships? Or rather: how do we create the CSO-business partnerships of the future?

As the report will show, such sources are numerous and the literature with guidelines, models, frame-works and instructions on partnerships is rich. The objective of this report is to synthesise them and draw out the key learnings but also their shortcomings. It is not the objective of the report to come up with a new analytical approach. It is to provide the foundation for the next phases of the project, where approachable, easy-to-understand and most importantly practical and applicable insights on actual do's and don'ts when developing and implementing a strategic partnership will be developed.

The literature review is empirically substantiated by collection of good practice from three global good cases on CSO-business partnerships, the experience and insights of more than 20 businesses and CSOs from the Partnership Arena as well as a 360-degree evaluation of two case partnerships. The two case partnerships are presented in chapter 8. The purpose of the empirical input is twofold: To gain insights into the challenges that occur when developing and implementing partnerships but also to understand good practices and concrete examples of what actually works.

Developing these tools and guidelines will be part of the next phases of the project Future Partnerships models for strategic CSR. It is the hope that this will support CSOs and businesses in harvesting the multitude of benefits that such partnerships can provide in terms of positive impact.

¹: <http://www.uncsd2012.org/partnerships.html>

²: <https://sustainabledevelopment.un.org/topics/sustainabledevelopmentgoals>

4 - PROCESS AND INPUTS

CASE PARTNERS

CARE Danmark and Coop partnership on responsible sourcing.

Red Cross and Grundfos partnership on access to clean water.

For more information on the case partner projects, please refer to chapter 8.

PARTNERSHIP ARENA

An exclusive forum established for this project of leading CSOs, businesses, organisations and experts that acts as a knowledge cluster, providing guidance, inspiration and validation to the project results through their personal experiences and competencies. For a list of participants, please refer to chapter 10.

ADVISORY BOARD

The Board provides strategic guidance to the overall project and consists of executives from Danish Red Cross, A.P. Moller–Maersk, CBS, ISS and Deloitte.

This report is based on desk research, literature review of current partnership models, frame-works, and literature, interviews and evaluations of existing partnerships.

The process has included three elements:

A literature review with the aim of providing an outline of existing models for CSO-business partnerships, including an in-depth review of ten partnership models. The purpose of the literature review is to understand the current landscape in terms of models, guidelines, frameworks, etc. for CSO-business partnerships. There are two reasons for this. The first is to identify whether existing models include information on all relevant stages that a partnership goes through and how to address challenges, manage risks and measure impacts. The second is to establish an evaluation framework for the insights provided by the Partnership Arena, international good practice cases and the evaluation of the two Danish case partner partnerships. The framework consists of the following seven elements: Strategic fit, Project structure, Roles and responsibilities, Finance, Implementation, Communication and Monitoring and evaluation, as presented on page 25.

A collection of insights and know-how based on good practice partnerships collected through phone interviews

with three international good practice cases and workshops with the Partnership Arena followed by a survey and follow-up interviews also with selected members of the Partnership Arena. The purpose of the collection of know-how and insights from these two stakeholder groups is to gain a deeper understanding of challenges, barriers, successes and opportunities within the partnership on a strategic level.

An evaluation of two Danish CSO-business partnerships (case partners), through a 360-degree evaluation including a self-assessment, interviews and facilitated workshop. The purpose of the evaluation is to gain a deeper insight into the practical challenges, risks and barriers between all the partners in the partnership with a particular focus on the local organisations and the beneficiaries.

The literature review process has been assessed by an independent external expert³. The Partnership Arena, the Advisory Board and the cases partners have several times provided input to this report.

Elaboration on the methodology is presented in chapter 11.

³: The expert is Janni Thursgaard Pedersen, PhD fellow, cbsCSR Centre Manager.

5 - DEFINING A PARTNERSHIP

A partnership is more than a relation. More than a collaboration. A partnership is commonly understood to be based on some sort of sharing and learning – of resources, competencies, risks or benefits.

Partnerships between CSOs and businesses come in all shapes and sizes ranging from cause-related marketing to co-creation of innovative collaborations (Kourula & Halme 2008). However, a review of existing literature on and models for CSO-business partnerships shows that they can be divided into two categories, transactional and transformational.

The figure below presents an overall illustration of these two general categories, their subcategories, and a number of factors where the two types of CSO-business partnerships differ. However, it is not uncommon that a partnership in reality has characteristics from across the continuums.

The two categories of partnerships differ fundamentally on a range of parameters such as level of participation, resource type, management complexity and strategic value.

Transactional partnerships are characterised as transactions of funds/money/competencies, from the business partner to the CSO, and realised by activities such as donations, pro bono contributions, marketing activities, communication campaigns and projects not directly linked to the core competencies or strategic focus of the business involved.

The resources involved are relatively low, few people in the organisations are involved in the partnership, and it is often managed by communication, marketing or CSR departments.

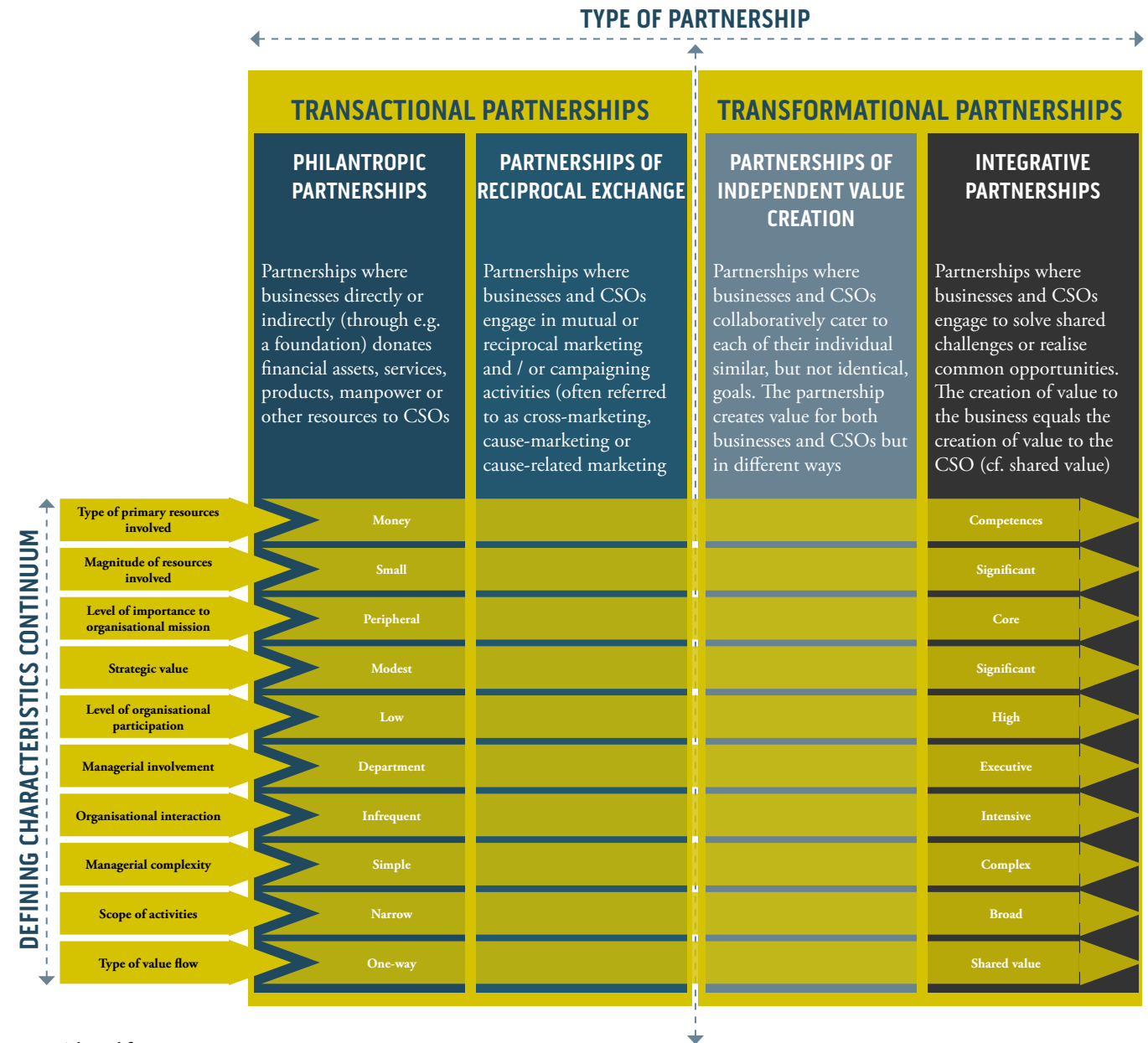
Transformational partnerships, on the other hand, are characterised by projects built upon the core competencies and strategic focus of all the parties involved in the partnership.

This kind of partnership has a joint value creation, a joint definition of purpose and is often focused on collaboration within the value chain of the business partners. Transformational partnerships are at the core of the CSO and the business' mission and have a significant strategic importance.

This form of partnership entails that the parties engage in solving shared challenges or realising common opportunities, that they share the value being created and have a joint definition of purpose. In addition, the way the parties work and create value is altered due to the partnership – it is not a case of 'business as usual'.

However, this does not mean that the motivation for entering into the partnership or the purpose of the value being created necessarily have to be identical. Both parties in a transformational partnership invest in the project but often also seek external funding for project implementation.

There may still be an element of donation of money but the important element is know-how and qualifications,



Adapted from: Austin, 2007, 2010; Barroso-Méndez et al. 2014; Berger et al. 2004; Bowen et al. 2010; Clarke & Fulle 2010; Gjerdrum Pedersen & Pedersen, 2013; Kaurula & Halme, 2008; Neergaard et al., 2009; Seitanidi, 2010

6 - LITERATURE REVIEW

the projects are more broad and complex and based on new ways of working together, of addressing a challenge, of communicating and of creating value. Thus, more people and more functions in both the CSO and the business are engaged in the partnership.

Two ways to a strategic partnership

There are two different ways to engage in and form strategic CSO-business partnerships. The type of partnership that a CSO and a business enter into should be based on what they want to achieve, what kind of resources they can spend on the partnership, how much time, manpower and money they are willing to commit and the importance of the partnership to the organisation's mission and management.

This does not mean that one is better than the other, or that all transactional partnerships should be transformed into transformational partnerships.

That being said, the transformational partnerships have as their objective and strength that they can be a means of addressing the complex social and environmental

challenges that are the strategic focus of both the CSO and the business involved (Millar, Choi & Chen 2004).

It is in this type of partnership where the partners are able to achieve more than they could on their own. Where they pool their resources, competencies and know-how and create something new.

A new approach. A new business model. A new way of reaching beneficiaries. It is because the challenges are inter-connected and because experience shows that one player cannot solve them alone, that new and innovative approaches are needed.

That is essentially, why transformational partnerships are more suitable for the complex challenges than transactional.

The focus in this report is on the transformational partnership due to its inherent potential for tackling these challenges.

There is an abundance of different frameworks, guidelines, instructions and tools available for CSOs and businesses on how to approach a transformative partnership.

The aim of the literature review is to provide an outline of a broad range of existing models for CSO-business partnerships, including an in-depth review of ten partnership models. The purpose is to understand the current landscape and resources already available in terms of models, guidelines, frameworks, etc. for transformational partnerships.

In order to assess these resources available, the following activities have been performed:

1. Assessment of existing academic literature in the research field around CSO-business partnerships, including management studies, organisational and institutional studies, development studies, and social, environmental and economic impact studies. A description of the methodology behind this assessment is presented in further detail in chapter 11.
2. In-depth review of the following ten partnership models for CSO-business partnerships:

Borrini-Feyerabend, et al., 2007:
Co-management of Natural Resources

The Partnering Initiative, 2009:
Moving On Toolbook

Deloitte University Press, 2013:
The Roadmap Toward Effective Partnerships

The Partnering Initiative, 2011:
The Partnering Toolbook

GEMI & EDF, 2008:
Guide to Successful Partnerships

UN Global Compact, 2013:
UN-Business Partnership Handbook

International HIV/Aids Alliance, 2002:
Toolkit: Pathways to Partnerships

UN Global Compact LEAD, 2011:
Partnership Fundamentals

OECD LEED, 2006:
Successful Partnerships

WWF UK, 2009:
The Partnership Toolbox

Partnership challenges and risks

The reasons why businesses decide to collaborate with CSOs can be many. First, a successful strategic partnership can open new opportunities for the business, such as access to new markets in developing countries, increasing understanding of local conditions and enhancing legitimacy in local communities. Long-term collaboration with a CSO can enhance the

opportunity to engage with consumers in a common cause, and likewise to establish brand and product loyalty (Sagawa & Segal 2000).

For the CSOs, partnerships with businesses can create opportunities for CSOs facing a growing number of complex humanitarian needs and tight budgets. Hence, CSOs collaborations with businesses can benefit from access to new competencies, innovative technology solutions and products, branding opportunities, access to new groups of volunteers, as well as services and infrastructure to support their activities (Gjerdrum Pedersen & Pedersen 2013).

According to a 2013 study from C&E Advisory Services on Corporate-NGO partnerships, 96 percent of CSOs and 84 percent of businesses expect partnerships to become increasingly important to their organisations over the next three years. Correspondingly, 65 percent of businesses and 86 percent of CSOs also expect their investments in partnerships to increase (C&E Advisory Services Limited 2013).

Despite the benefits and increased focus on engaging in partnerships, CSOs and businesses still encounter challenges from such collaboration (UN Global Compact 2013). In order to assist CSOs and businesses in overcoming these challenges, a number of players working in the partnership field have made available various instructive frameworks, models or toolkits on how to develop, build, implement and sustain transformational partnerships.

However, it was not possible to identify one model that identifies all the challenges. We have therefore identified 11 key challenges and related risks described in the various existing frameworks and models, illustrated in the figure on the following page.

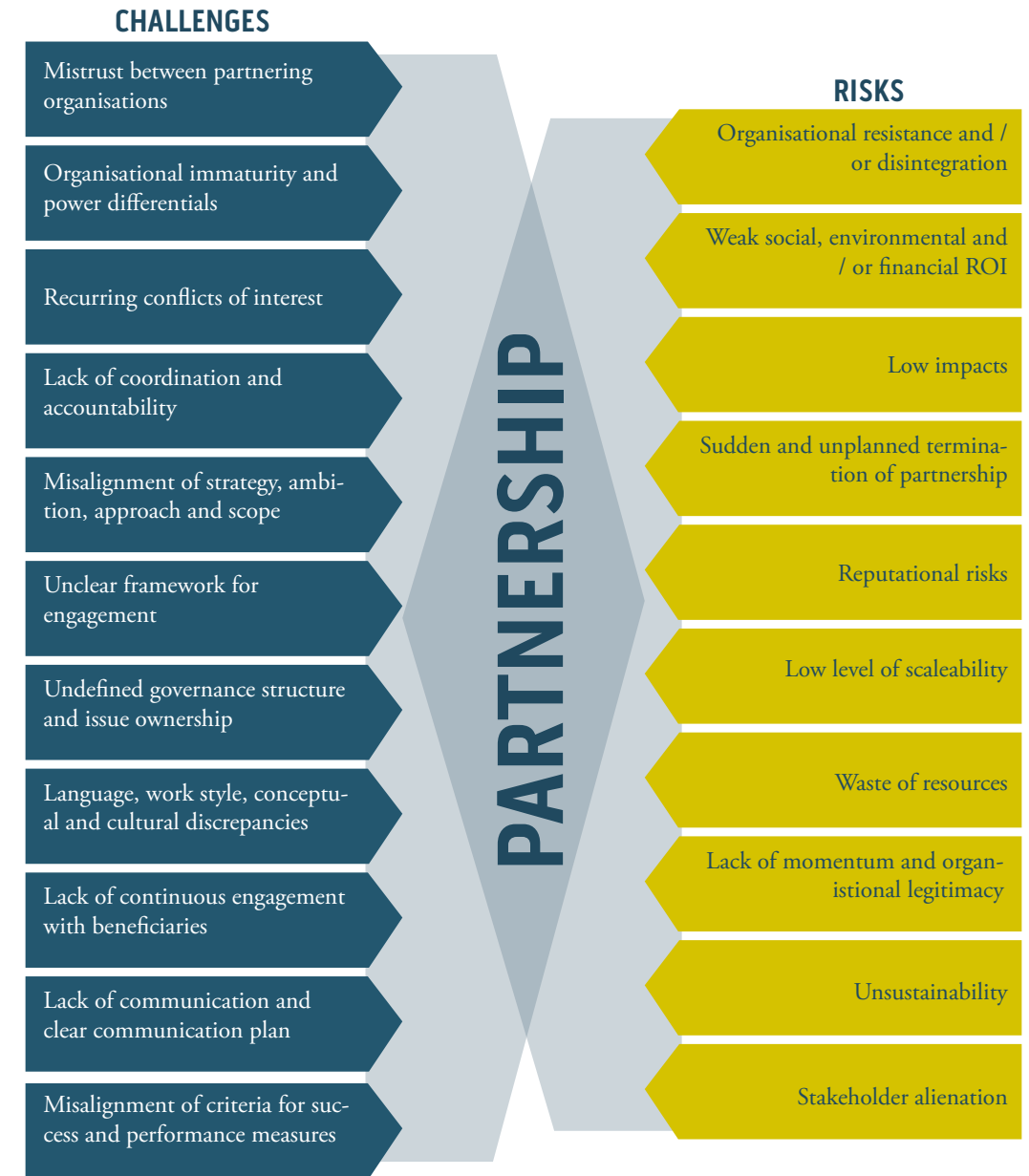
The challenges are listed to the left in the figure. The risk of not addressing the challenges are listed to the right of the figure.

The literature review shows that the degree, to which the existing partnership models provide guidance on the challenges inherent to partnerships, varies.

Only one of the selected models, *Successful Partnerships*, from the OECD LEED (OECD LEED 2009), provides guidance on how to overcome or avoid all challenges.

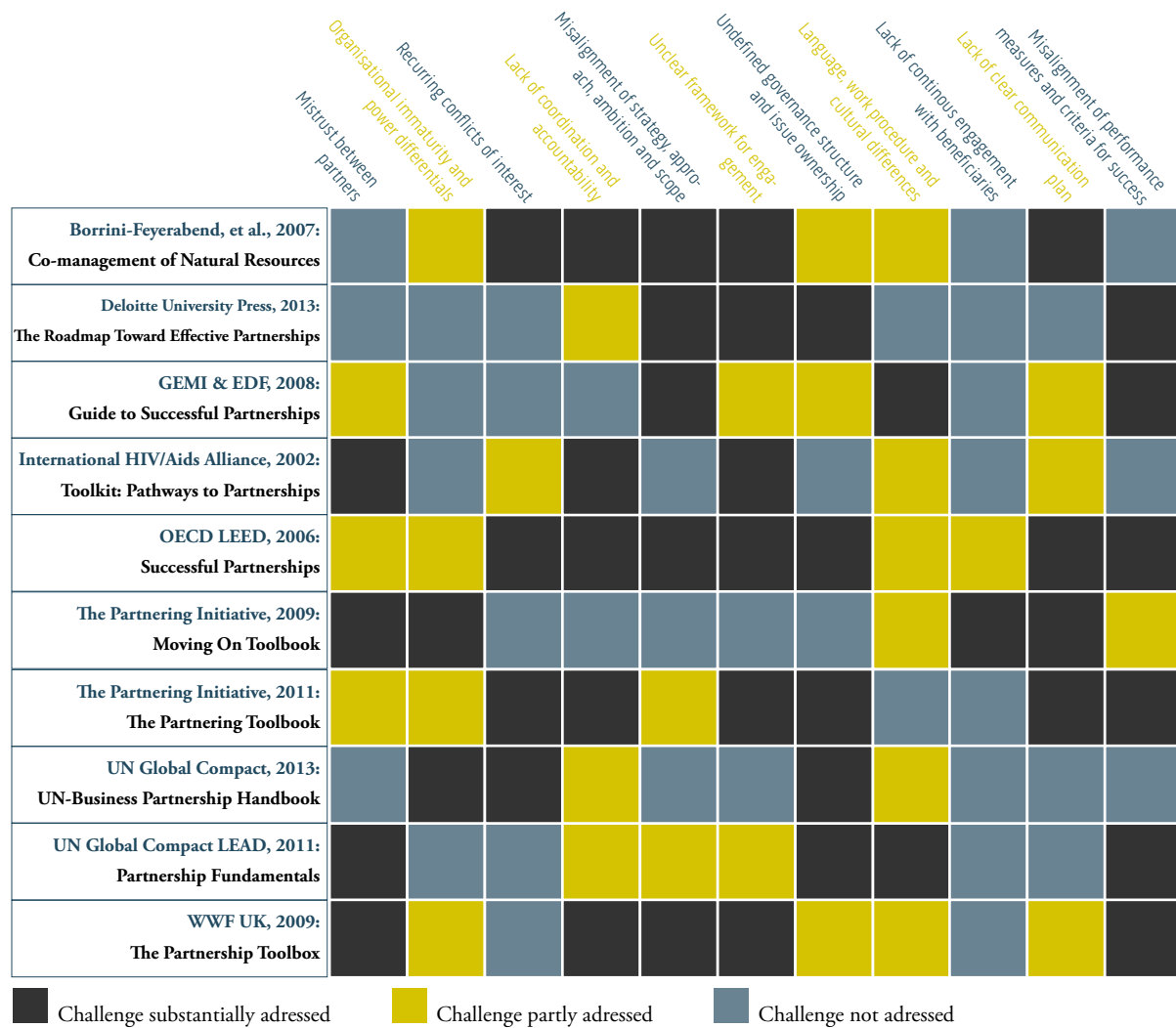
In addition, even this model only partly addresses four out of the 11 challenges. The review also shows that one challenge in particular is overlooked and that is local, continuous engagement with beneficiaries.

The extent to which the ten models address these challenges is shown in the illustrative figure on page 18.



Adapted from:

Austin, 2000, Austin & Seltaniol 2012; Berger et al. 2004, Bryson et al., 2006; Burchell & Cook 2008; Heffermen 2004; Millar et al., 2004; Macdonald & Chrisp 2006; Ostrower 2005; Gjerdrum Pedersen & Pedersen 2013; Pedersen & Gjerdrum Pedersen 2012; Sagawa & Segal 2000; Seltaniol & Crane 2009; Seltaniol & Ryan 2007; Selsky & Parker 2005; Wymer & Samu 2003



The figure indicates the degree to which the ten models provide instructions on how to address the challenges. If a challenge is mentioned in a model but the model does not provide any framework for avoiding or overcoming the challenge, the challenge is labelled as having been ‘partly addressed’ by the model.

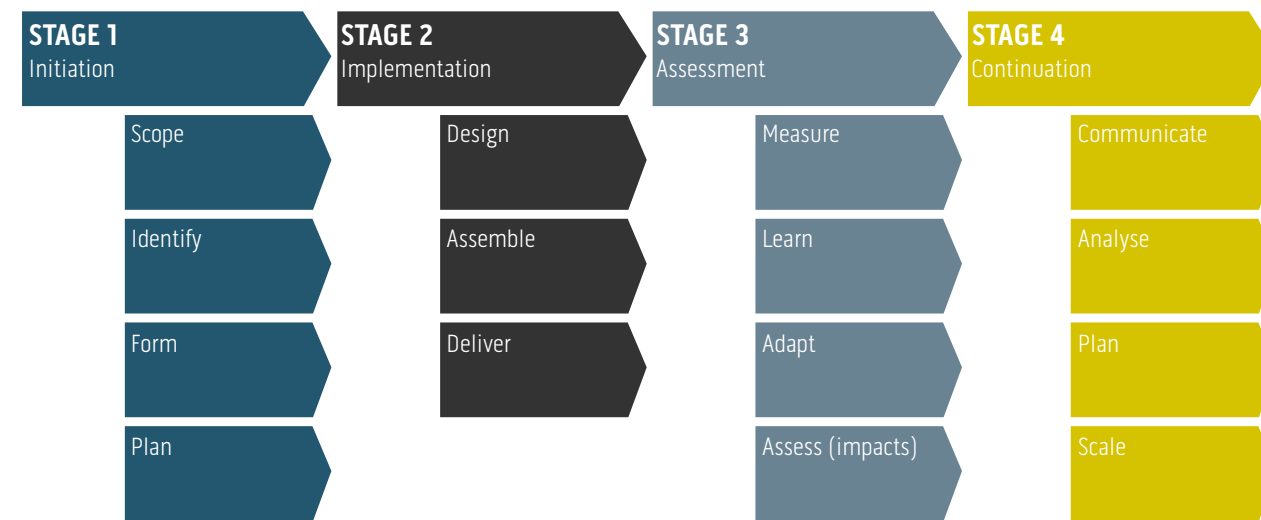
If a model provides sufficient information or instructions to allow the partners to likely overcome or circumvent the challenge, the challenge is labelled as having been ‘substantially addressed’.

STAGES OF THE PARTNERSHIP PROCESS

The literature review also shows that many of the existing partnership frameworks and guidelines address

a number of development stages that a CSO-business partnership goes through.

The figure below illustrates an overview of stages and main activities that is addressed in the existing models.



Adapted from: Tennyson, 2011

The first stage constitutes the initiation phase of the partnership. This is where the partners identify opportunities for collaboration, where the project is scoped and formed, and an initial plan developed.

In the next stage, the project is designed, put together and finally implemented on the ground.

The implementation stage is followed by an assessment stage. This constitutes the phase where the project is evaluated, impacts assessed and potentially adapted if the evaluation shows reason to do so.

The final stage is the continuation where the decision to continue or even scale the project is made.

Ideally, existing models on CSO-business partnerships should address all of the four stages at some point. This will most often be a non-linear process.

However, the review shows that existing models on CSO-business partnerships do not always cover these four project stages.

The figure below shows the extent to which the 10 models cover all four stages.

| | Initiation | Implementation | Assessment | Continuation |
|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Borrini-Feyerabend, et al., 2007: Co-management of Natural Resources | Guidance provided for the stage | Guidance provided for the stage | Guidance provided for the stage | Guidance not provided for the stage |
| Deloitte University Press, 2013: The Roadmap Toward Effective Partnerships | Guidance provided for the stage | Guidance not provided for the stage | Guidance not provided for the stage | Guidance not provided for the stage |
| GEMI & EDF, 2008: Guide to Successful Partnerships | Guidance provided for the stage | Guidance provided for the stage | Guidance provided for the stage | Guidance not provided for the stage |
| International HIV/Aids Alliance, 2002: Toolkit: Pathways to Partnerships | Guidance provided for the stage | Guidance not provided for the stage | Guidance provided for the stage | Guidance not provided for the stage |
| OECD LEED, 2006: Successful Partnerships | Guidance provided for the stage | Guidance not provided for the stage | Guidance provided for the stage | Guidance not provided for the stage |
| The Partnering Initiative, 2009: Moving On Toolkit | Guidance not provided for the stage | Guidance not provided for the stage | Guidance not provided for the stage | Guidance provided for the stage |
| The Partnering Initiative, 2011: The Partnering Toolkit | Guidance provided for the stage | Guidance provided for the stage | Guidance provided for the stage | Guidance provided for the stage |
| UN Global Compact, 2013: UN-Business Partnership Handbook | Guidance provided for the stage | Guidance not provided for the stage | Guidance not provided for the stage | Guidance not provided for the stage |
| UN Global Compact LEAD, 2011: Partnership Fundamentals | Guidance provided for the stage | Guidance provided for the stage | Guidance provided for the stage | Guidance not provided for the stage |
| WWF UK, 2009: The Partnership Toolbox | Guidance provided for the stage | Guidance not provided for the stage | Guidance provided for the stage | Guidance not provided for the stage |

Guidance provided for the stage
 Guidance not provided for the stage

Only one of the selected partnership models, The Partnering Toolkit” from the Partnering Initiative (Tennyson 2011), provides adequate guidance for all the identified stages.

Furthermore, the review indicates that where the majority of models provide guidance on the initiation stage, only a few of them address the continuation stage.

KEY LEARNINGS FROM THE LITERATURE REVIEW

The challenges and risks associated with CSO-business partnerships are varied and plentiful.

However, as the review describes, just one model addresses all the identified challenges and risks, but with a weak focus on the continued engagement of the beneficiaries.

Only two of the ten analysed models address the local beneficiaries of involvement of the local partners. In terms of stages, only one model covers all four stages and that there is a tendency in the models to focus on the initiation stage and overlook the continuation stage.

This shows, that even though there is a large amount of guidance out there available to people working with CSO-business partnerships, none of them have previously succeeded in addressing all key challenges or project stages.

Even the best of them have their weak spots.

7 - LEARNING FROM OTHERS - GOOD PRACTICE

Transformational partnerships may not be easy and straightforward to develop and implement, but there are inspirational examples out there, which show how successful partnerships bring value to all parties involved.

The purpose of this chapter is to gain know-how and insights from existing partnerships and the people working with them on a daily basis to gain an understanding of challenges, barriers, successes and opportunities met within the partnership on a strategic level.

The findings of this chapter are based on interviews with the CSO and the business representative in three international good practice partnerships, and workshops complemented with survey and follow up interviews with selected members of the Partnership Arena.

The purpose of the interviews is to complement the theoretical insights and identify concrete experiences with challenges, risks, opportunities and benefits inherent in transformational CSO-business partnerships.

INTERNATIONAL GOOD PRACTICE CASES

Despite the seemingly very different nature of the partnerships they are all seen as good cases illustrating the unique value of transformational partnerships in achieving something that the partners could not have achieved on their own.

All three partnerships are also targeting beneficiaries in the developing world and have achieved tangible, positive impacts.

The partnerships are viewed as success stories not only by their peers but also by the organisations themselves.

“Often people don’t know what they want out of the partnership.

We both knew.

That made all the difference!”

- Respondent

WSUP AND LIFEBOUY

This partnership is a collaboration between Water & Sanitation for the Urban Poor (WSUP) and Lifebuoy. WSUP is a non-profit British-based multi-sector partnership organisation focusing on developing commercially viable models to help water utilities and municipal authorities reach all citizens.

Lifebuoy is a Unilever brand selling germ protection soap.

The objective of the partnership is to expand the impact of WSUP’s hand washing programmes through

promotional campaigns in Bangladesh and Kenya. WSUP and Lifebuoy have jointly launched school programmes to change the hand washing habits of children and their families. This partnership can be characterised as a transformational partnership, as it is built upon the core competencies and strategic focus of both parties involved.

They have a joint value creation and engage in solving shared challenges and realising common opportunities within water utilities and sanitation.



SAVE THE CHILDREN AND THE IKEA FOUNDATION

Save the Children, the world's largest independent organisation working to protect children's rights, and the IKEA Foundation, the charitable foundation that oversees all of IKEA's global philanthropy, work together to actualise children's rights to a healthy and secure childhood with access to quality education. By listening to and learning from children, they jointly develop long-term projects that empower communities to create a better everyday life for children. Save the Children and the IKEA Foundation have collaborated since 1994 when Save the Children was instrumental in the development of IKEA's policy

against child labour, 'The IKEA Way on Preventing Child Labour Code of Conduct' launched in 2000. The collaboration has since then broadened and deepened into a number of ventures, including long-term strategic projects focusing on children's rights to health and access to quality education.

The partnership can be categorised as a transformational partnership as it arose as a response to child labour issues in IKEA's value chain. The partnership was, and still is, interested in a common objective, where each partner brings its own interests, competencies and resources to achieve a common goal and come up with a solution to battle child labour.

OXFAM AND SWISS RE

Oxfam America, part of the global organisation working on tackling the root causes of poverty, and Swiss Re, a global wholesale provider of insurance, collaborates on protecting livelihoods in a changing climate through the R4 Rural Resilience initiative. Insurance promotes risk-taking essential to economic growth and development and taking risks is essential to economic growth and development - but how can the world's poorest communities afford it? This project gives poor farmers and rural households

the option to pay for insurance by contributing their time and labour to local climate adaptation measures, such as crop irrigation and forestry projects.

The project is a partnership between Oxfam America, the World Food Programme and Swiss Re and builds on the success of the Horn of Africa Risk Transfer for Adaptation (HARITA) project in Ethiopia. The partnership can be categorised as a transformational partnership, as the purpose is to combine each of the parties' core competencies to build and design a new product offering for a new market.



THE PARTNERSHIP ARENA

The Partnership Arena was established as part of this project and they have provided valuable input to the report based on their real life experiences working with partnerships.

Among them they represent some of the most successful and well-known CSO-business partnerships in Denmark.

THE PARTNERSHIP ARENA

Representatives from: access2innovation, ATP, Børnefonden, CARE Denmark, Carlsberg Group, Confederation of Danish Industry, Danish Chamber of Commerce, Danish Ministry of Foreign Affairs, Danish Red Cross, Dansk Supermarked, Grundfos, H&M Conscious Foundation, IBIS, IC Companys, Novo Nordisk, Palsgaard, Save the Children Denmark, SOS Children's Villages, The Danish NCD Alliance, Danish Cancer Society, TOP-TOY, United Nations Development Programme, Fairtrade, and Børnefonden.

The insights on both challenges and good practice obtained from the international cases and the Partnership Arena are summarised on the opposite page, taking form as a number of key learnings.

The evaluation framework comprise the following seven key areas: *Strategic fit, Project structure, Roles and responsibilities, Finance, Implementation, Communication and Monitoring and evaluation.*

The findings are analysed and categorised based on an evaluation framework, which is based on the challenges and risks identified in the initial literature review.

The key areas are also depicted in the table on the opposite page.

CHALLENGES

INCLUDING CHALLENGES REGARDING E.G.:

STRATEGIC FIT

Regards the link between the partnership and the involved organisation's core business.

- Support of organisational goals and purposes
- Integration into organisational strategy, budget and action plans

PROJECT STRUCTURE

Regards the governance structure and legal framework of the partnership

- Management involvement and commitment
- Contracts and non-compliance/violation agreements
- Exit strategies

ROLES & RESPONSIBILITIES

Regards the involved organisation's allocation of resources and mandate in the partnership

- Designated project manager
- Authority and mandate
- Allocation and distribution of resources, competences, risks, etc.

FINANCE

Regards the financial resources allocated to the partnership and the financial framework of the partnership

- Budget and control instruments
- Financial agreements
- Financial disclosure

IMPLEMENTATION

Regards the scope and elements in the implementation of the partnership

- Implementation plans
- Milestones and execution
- Risk mitigation

COMMUNICATION

Regards communication and collaboration between the partners involved

- Communication plan
- Reliable and constructive dialogue
- Communication with external stakeholders

MONITORING & EVALUATION

Regards the degree of monitoring and evaluation of the partnership

- Monitoring and evaluation routines
- Outcomes
- Impacts

KEY LEARNINGS FROM INTERVIEWS AND GOOD PRACTICE

Strategic fit

The starting point of all partnerships should be an identification of a strategic fit of the partners and formulation of a shared purpose as early in the process as possible. This includes establishing a shared purpose for the partnership and clear objectives.

If the strategic fit cannot be established clearly and early in the process, the respondents recommend that, the project be abandoned and the resources be used elsewhere.

It may seem harsh but a partnership is a time- and resource-consuming process especially if the purpose can be achieved in another way.

However, a clear strategic fit can be difficult to achieve and several reasons for this is mentioned. One is cultural differences. Another reason is the inability of the partners to agree on a joint strategy and purpose, often due to a poor match of the organisations. Therefore, there is a critical need for assessing the match and foundation of the partnership before initiating an actual collaboration.

The question of creating shared value, is related to identifying the strategic fit is.

Creating shared value is the very foundation of a transformational partnerships, but it is not always achieved. This links back to the necessity of establishing the shared purpose of the partnership, which includes identification of the shared value for all parties.

Shared value does not mean that the value created for one party should equal the value being created for another party. What matters is that the partnership is valuable to all parties.

This is unfortunately often overlooked when it comes to the local stakeholders. There appears to be a tendency to not involve local stakeholders in the important stage of identifying the strategic fit and agreeing on the purpose of the partnership.

Overlooking this very important group makes it difficult to achieve true shared value among all parties involved.

Project structure

Establishing formal structures for a partnership such as a collaboration agreement or other legal documents does not generally constitute a challenge.

However, obtaining organisational buy-in and management commitment from the organisations for working with transformational partnerships in the first place is a major challenge.

Several reasons for this are mentioned. One is that such partnerships are perceived as insignificant from a business perspective and as disconnected from core business. Another is the common practice of partnerships being born out of CSR or marketing activities; hence, CSR departments make it difficult to integrate the partnerships into the business.

Therefore, the partnerships might not be managed in the manner that other projects would be.

In terms of how to obtain organisational buy-in, several solutions were mentioned. One is to strengthen and

clarify the value creation of the partnership - or in other words, be clear on the return on investment. Another solution is to lift the partnerships out of the CSR or marketing department and into a business development or operating unit of the organisations.

Too little and belated involvement of the beneficiaries and other local stakeholders were mentioned by members from both CSOs and business.

Transformational partnerships are largely the result of decisions made in developed countries where a CSO and a business identify a partnership opportunity and start scoping and developing the project. This is most often done as a headquarter exercise without the beneficiaries, and the local implementing partners are not involved. The reasons for this are several. One is the focus on costs and results. Involving local stakeholders takes time and costs money and the direct results can be few.

For a business focused on seeing direct results of their investment this can be a tough sell for the CSO. However, if this is not done, the result can be inefficient implementation processes, un-met expectations and suboptimal value creation.

Roles and responsibilities

It may be self-evident, but being clear on each party's roles and responsibilities is essential when running an efficient transformational partnership.

This involves that the precondition for making the partnership a success, is that the parties involved must have access to other departments and local branches across

the organisations. Despite the obviousness of the importance of distributing roles and responsibilities, including mandates and authority, there often seems to be some uncertainty about this.

One way of mitigating the challenge of unclear roles and responsibilities and to minimise misunderstandings, is to establish a strategic advisory function, a board or similar body comprising representatives from all parties involved and to determine the specific roles and responsibilities of the parties in a written document.

In terms of the roles and responsibilities internally in the partner organisations, there appears to be a propensity for the CSOs to be organised in corporate relations teams.

Each partnership has a key account manager reflecting the necessity of a fixed contact person. The corporate relations teams are the entry point for the businesses but project implementation is most often handled by the programme departments.

However, the corporate teams maintain some involvement in the partnership and often act as a mediation or translation function between the programme department and the business.

On the business side, there is not the same similarity in how they organise themselves.

Supporting the more formalised organisational set-up is the personal relationship.

Their importance is stressed repeatedly. As one respondent puts it: "*The personal relationship is alpha and omega!*" Transformational partnerships require new ways of

thinking and operating, and trust is an important factor in adjusting to new situations and finding new solutions. Good personal relationships between the involved parties are utilised to the fullest if, simultaneously, there is a correct allocation of the necessary internal resources and clarification of responsibilities, the Partnership Arena argues.

Finance

Even with the strategic fit identified and roles and responsibilities clearly assigned, insufficient resources often pose a challenge for building of successful partnership. In this relation, resources are defined in the form of either time, people or money.

Insufficient allocation of resources is a challenge not only linked to the partnership, but also linked to the internal dispositions of the individual partner organisations.

One reason linked to the insufficient allocation of resources, is the fact that the time and resources need-ed for managing partnerships are often underestimated by the parties involved.

The well-known case, where project management activities require more resources than expected, and the trade-off between resources spent on project management and administration versus project implementation, is a challenge for many of the respondents.

Hence, the Partnership Arena points to the overall matters of flexibility and receptiveness; i.e. flexibility in terms of forming realistic expectations towards all parties involved as to the progression of the implementation, and being realistic with regards to the budget, e.g. by

making room for ongoing flexibility and potential adjustments that can include costs for administration and project management on both sides of the partnership.

Another reason for insufficient allocation of resources, can be the disconnect between the businesses' need for documented impact of all the funds invested and the CSOs need for funding of not only the specific project but also general operations.

One respondent points to that businesses do not always appreciate that collaborating with a CSO is not free. That the CSO needs to cover its costs for man-power, administration and project management.

Further, organisations – including leadership – do not always recognise the potential in partnerships or how they work. Thus, there is a resistance to allocate the resources needed to develop and implement partnerships. Consequently, partnerships are perceived as not delivering the expected results.

This leads to a vicious circle where partnerships are not prioritised internally in terms of allocated resources leading to sub-optimal results.

However, the respondents recognise that if the business case of a partnership is attractive enough and promises to deliver good enough results, then the resources will most often be provided.

Finally, third party funding from developmental or governmental bodies can be a solution to challenge of lack of resources.

However, it can make implementation more challeng-

ing due to increased bureaucracy in the work processes. On the other hand, this can also provide a value-adding implementation and re-porting framework.

Implementation

A detailed project plan with clear milestones, deliverables, roles and responsibilities is the starting point of efficient and successful implementation.

However, reality can challenge even the best-planned project and in order to manage this one rule is to start out small.

The benefits are several. Firstly, the resources invested in a smaller partnership may not be huge and thus the risk associated with a partnership not turning out as planned may be equally small.

Secondly, it can be a good way for the parties to get to know each other and evaluate whether there is a basis for expanding the partnership.

Thirdly, with a smaller partnership it may also be easier and quicker to get the partnership operational and thus to learn from it.

Fourthly, it is easier to be flexible and compromise – something that is important when entering into a new project with new partners.

Once the partnership is well established and the partners have a trusting relationship, there is a solid foundation for expanding the partnerships. That could be in terms of more locations, more beneficiaries or more projects.

Despite the respondents seeing (initial) benefits in a small partnership, longevity appears to have a positive impact on the success of a partnership.

When a partnership runs for several years, trusting relationships have often been formed as well as an understanding of the partners' objectives, culture and operating procedures achieved.

This makes collaboration more smooth and efficient and may also pave the way for new collaborations. For instance, some partnerships have started out as transactional but have over time developed into transformational.

Other partnerships grow out of a need to access, develop or solve a challenge met in the organisations, such as the case with IKEA and their need to address challenges with child labour in their supply chain.

Communication

One respondent's advice really sums it up: "*Communicate, communicate, communicate*".

It seems that internal communication is both one of the main challenges of partnerships but also a means of overcoming this challenge.

The key is to establish a relation characterised by transparency and a trusting and open dialogue about challenges and opportunities.

This can be achieved by establishing a modus operandi for internal communication between the parties with fixed meeting intervals and agenda items.

Another recommendation is to separate the overall strategic element from the more operational. This reflects the recommendation for organising the partnership with a strategic advisory board for high-level decisions and the day-to-day handling of the partnership to an operational level.

CARE's savings and loans groups help people, especially women, build the skills to save and manage their money effectively and start up small businesses of their own.

Photo © by Jon Spaul/CARE/Uganda



Personal relations also ensure enhanced communication. Strong personal relations among all parties, including local stakeholders, must be evident in order to ensure a trusting and open dialogue where challenges are managed up front and in good spirits.

Monitoring and evaluation

Clear success criteria should be established as part of the project development and ideally reflect positive impacts in relation to what it is all about – improving the lives of the beneficiaries.

Further, in order to track performance and have a basis for evaluating the project, key performance indicators (KPIs) should be established early in the process. Progress on the KPIs can also be important input to both internal and external communication activities.

The respondents also point to the importance of having clear evaluation criteria in place, to conform to continuous dialogue on the progress of the partnership and to have a clear exit strategy in place, in case of an unsatisfactory process or results.

8 - CASE PARTNER PROJECTS

At the core of the analysis lies two Danish transformational partnerships. The partnerships were selected based on their merits as adding value to all parties as well as having impacts for local beneficiaries in a developing country. Further, the cases were selected for their differences in terms of industries, themes and beneficiaries.

The purpose of this chapter is to gain insight into the practical and local challenges in transformational partnerships with particular focus on the relationship among all the partners in the partnerships. The collection of insights took place as a 360-degree evaluation where the evaluation framework was based on the theoretical findings and good practice key learnings.

“The essence of partnerships is ‘work-ing with other organizations to achieve something you cannot by yourself’. If you can get that point, then you can partner up.”

- Respondent

DANISH RED CROSS AND GRUNDFOS PARTNERSHIP

Securing access to clean water

Securing access to clean water for the world's most needing people was the objective of the partnership between the largest CSO in Denmark, the Red Cross, and the world-renowned developer, manufacturer and seller of innovative pump solutions, Grundfos. The partnership was launched in 2010 and ran until 2012. In that period, ten Lifelink water systems were installed in Kenya. The Lifelink water system is a solar-powered water facility, where the citizens pay for the water over their cell phone.

Grundfos' employees funded installation of the water systems. Danish Red Cross has extensive experience with implementing water projects in Africa, and was responsible for project implementation with Kenya Red Cross as well as engagement and mobilisation of the local communities. The partnership succeeded in providing access to clean water for more than 15000 people. The partnership is a good example of bringing partners together where their core competencies are utilised to achieve a shared goal. The project was enabled by funding from a third donor.

CARE DANMARK AND COOP PARTNERSHIP

Responsible trade with Africa

CARE Denmark, a Danish CSO specialised in sustainable agriculture and water management, climate change and responsible value chain, and Coop, Denmark's largest retail and member-owned company, have joined forces to strengthen the sustainability of Coop's supply chain to the Savannah brand.

The partnership in particular seeks to ensure that Coop's trade with agricultural products from Africa is competitive and profitable while at the same time contributing to economic and social development amongst smallholder farmers in Kenya.

The partnership achieves this by increasing the availability of high-quality African products in Coop's stores whilst creating economic growth for the Kenyan small-holders. CARE Denmark has provided unique expertise within sustainable farming methods, mobilisation of farmers and local conditions. Coop has made available a stable take of the farmers' produce. The local farmers have received training in agricultural techniques, so that they can enhance their sale of produce and thus their income. The Danish consumers have access to a selection of high-quality sustainable products at competitive prices.

The partnership is a good example of how an innovative business model can combine retail and trade with environmental, social and economic development.

Participants in the evaluation were representatives from all parties of the project, i.e. the Danish CSO, the local CSO, the Danish business and the local business.

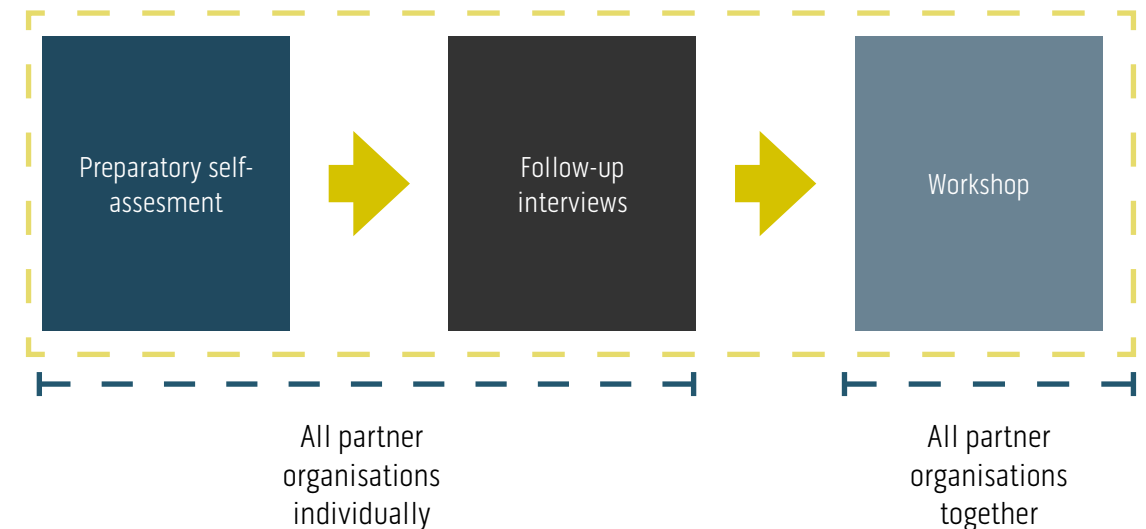
Danish Red Cross
Kenyan Red Cross
Grundfos
Grundfos LIFELINK

CARE Denmark
CARE International Kenya
COOP
Sunripe

The framework used in the 360-degree evaluation is based on the seven key areas: Strategic fit, Project structure, Roles and responsibilities, Finance, Implementation, Communication and Monitoring and evaluation – as described on page 27.

The 360-degree evaluation consisted of three elements: A self-assessment done by the individual partner organisations conducted as an online survey, follow-up inter-views conducted over the telephone and finally a workshop with representatives from all the partner organisations.

The evaluation framework is depicted below.



CHARACTERISING THE CASE PARTNER PROJECTS

The project between the Red Cross and Grundfos on securing access to water in Kenya was born in Denmark as part of an employee engagement initiative at Grundfos. Employees collected money for financing the installation of ten Lifelink water systems in Kenya. Danish Red Cross has strategic focus on water and sanitation in Africa, so the match seemed obvious.

Roles and responsibilities were defined. Grundfos contributed with the physical components of the water system, the Red Cross with mobilisation and training of the local communities where the water systems were installed.

The contribution by Grundfos was the financing of the Lifelink water systems corresponding to approximately 40 percent of the project budget.

Additionally, Nordic Climate Facility financed 57-58 percent of the project and Danish and Kenya Red Cross spent significant resources in terms of man-hours on the project, which was not estimated in the budget.

The strategic link for both organisations is obvious as they both contributed with their core competencies. However, the importance for Grundfos in terms of business relevance was a minor focal point, as the employee engagement was the main reason for entering the project.

Organisational resources were identified in both organisations with the project being located in Grundfos' Sustainability and Lifelink departments and in Danish

Red Cross' CSR department with a link to the international operation.

At first, the complexity of the project was low, the role of Grundfos was to deliver the water systems and the Red Cross to use them with the local community strongly involved. As such, the project was initially a transactional partnership.

However, over the span of the project, the nature of the partnership developed. There were several reasons for this.

When the project entered the implementation stage, it became clear that the project was not as much a case of "business as usual" as first imagined.

The processes and tools that Grundfos and the Red Cross normally used in such projects were inadequate. There was a need to design a new and shared approach to the project. This indicates that the Danish organisations did not consider all relevant aspects when developing the project plan.

Examples of this was the need for increased coordination and cooperation that was made necessary by the complex knowledge transfer from Grundfos to the Red Cross and subsequently to the local communities on how the water systems are managed and maintained and on the complexity and longevity of implementing and handing over the water systems to the local communities.

In addition, the involvement and awareness on different roles of the local organisations, i.e. the Red Cross in Kenya and Grundfos in Kenya, had been insufficient in the initiation stage.

For these and other reasons the scope of the project was extended as the difficulties mentioned meant that not all pumps in all communities were running as expected by project end.

The challenges resulted in an increased level of organisational participation from both the Red Cross and Grundfos. The project ended up as a transformational partnership – a development that became evident building on a list of elements.

Competencies and working hours were the primary resources invested in the partnership. A new and shared approach to the project was developed during the process. Complex knowledge transfer took place.

The organisational interaction became more frequent as the project took off, and all parties in Denmark and Kenya were continuously involved.

The project between CARE Danmark and Coop was born out of discussions on how to increase the supply of African products to Coop's stores, while at the same time improving the environmental, social and economic conditions for farmers. This resulted in a collaboration aimed at strengthening Coop's supply chain and in particular increase sourcing from smallholder farmers as compared to sourcing from larger farmers only.

From the outset of the project, CARE Danmark and Coop recognised that the collaboration was new territory for both parties and that it would require new approaches, new ways of operating and new ways of implementing. The project was thus based on a frame-

work developed specifically for the project and a mutual operating structure.

Financial resources were obtained from DANIDA through their Business Partnership Programme, CARE Danmark has contributed with competencies and resources for project development, implementation, capacity building and training of the smallholder farmers and Coop with resources for project development and management and most importantly sales outlet for the produce.

The project is thus core to the mission of CARE Danmark and also to Coop, who at that time had just launched their new Africa strategy with the ambition to source more ethically produced products from Africa.

The governance framework for the project involved a joint steering board with regular meetings held in Kenya and Denmark, respectively.

Part of the steering group meetings included field visits to experience the chain from ground to soil including observations of Danish consumers in Coop's shops. A steering board secretary managed frequent communication between the parties, most often weekly, as well as regular reporting on progress and finances.

The project was designed with built-in flexibility and a learning component precisely to be able to learn and adjust activities during implementation.

This was very useful as changing EU regulations and world market prices along the course made other markets than the Danish more lucrative for small-holder farmers on certain produce.

The project is deemed a success by all partners and a valuable learning opportunity.

From a commercial perspective, Coop's sales target for Savannah were met and the Savannah brand was very well received by Coop's members and consumers.

In addition, Coop gained valuable insights into its supply chain and inputs for supplier management and product innovation.

Also from a social and environmental perspective, the results are remarkable: Reduced use of pesticides, increase in number of smallholder farmers in the value chain by 100 percent, increase in income amongst farmers by up to 40 percent, diversification of markets and produce and thus food and income security amongst farmers. The project exhibits most of the characteristics of a transformational partnership and can thus be described as such.

KEY LEARNINGS FROM THE CASE PARTNER PROJECTS

The 360-degree evaluation of the two case partner projects identified a number of challenges and key learnings, which are summarised below.

Strategic fit

The evaluations highlighted the importance of not selecting a partner without conducting a proper assessment of what the market has to offer. This goes for both CSOs and businesses. An existing relationship may seem as the most natural or easiest choice but it could exclude a better match or a more innovative approach.

The evaluations also highlighted the importance of a common understanding of who the target group is and their needs. If not all project partners share this, project implementation will be challenging and the value of the partnerships can be questioned.

A general reason for the lack of common understanding is differences in the target group for CSOs and businesses.

For the CSO it is the most needing, or players that have a direct impact on the livelihoods or rights of the poor.

For the business, it is not necessarily the most needing but the one that is closer to their value chain.

This creates challenges when it comes to identifying shared objectives and defining the strategic fit of the partnership. It is therefore important that there is a common understanding of who the target group is.

Project structure

The main learning point and experience from the evaluations is that transformational partnerships cannot be implemented or operated as business as usual.

Transformational partnerships consist of innovative projects that the organisations have not tried before; it is the very nature of transformational partnerships to include new ways of working, new approaches and new tools. Thus, without developing a joint operating framework, where the involved organisations agree on a mutual governance structure, operating practice and implementation plan, the potential of the partnership cannot materialise.

Using normal internal project processes and tools will only result in challenges in the implementation stage as the CSO and the business have too different cultures, languages and ways of working.

As described above, in the partnership of CARE Denmark and Coop a clear joint approach was developed at the beginning of the project, offering a solid foundation for the implementation stage.

In the case of the CARE Denmark-Coop partnership, the local partners including the Kenyan business partner, Sunripe, and a representative group of smallholder farmers participated in the design process through a series of analyses. The local business partner, Sunripe, participated in the actual design process.

For the Coop-CARE Denmark project, changing EU regulations and world market prices changed the rules of the game and made it necessary to diversify produce and markets beyond original demands by Coop.

For Danish Red Cross and Grundfos the need for increased coordination among all involved parties became a key learning at a later stage when the relationship transformed from a transactional to a transformational partnership.

The Grundfos-Red Cross project encountered challenges especially in the implementation stage due to an increased need for human resources and man-hours to ensure progress in the project.

It is important that projects are not run as a headquarter exercise as the local partners have essential competencies

and know-how in relation to community involvement, assessment of needs, capacity build-ing and local knowledge. These aspects must be reflected in the project design and implementation.

Further, insufficient involvement creates uncertainties, increases the risk of gaps between the project plan and reality on the ground, and weakens the intended positive impacts for the local beneficiaries.

Local involvement and engagement are simply a fundamental key to success. This was valid in both of the partnerships where the contributions by and competencies of the local partners resulted in continuous adjustment of the project to increase the positive impacts for the local beneficiaries.

Roles and responsibilities

Both of the evaluated partnerships bear witness to the importance of good personal relationships between the individuals involved in the project.

This was also one of the key learnings from the international good cases.

As transformational partnerships require new ways of thinking and working, the personal relationship becomes crucial.

The evaluated organisations have all faced unforeseen challenges where they had to adjust to new situations and find new solutions.

To tackle this situation, trusting relationships in which issues can be addressed upfront and in open dialogue are a key to success.

Another key learning from the evaluation process was

the need to appoint a project manager from each organisation with the mandate to act and make day-to-day decisions.

Partnerships where too many people are involved or where the project manager has changed several times during the partnerships suffer from discontinuity, which creates confusion in decision making and the implementation of the project.

Further, a feeling of loneliness in the project management role and a sense of swimming against the tide within their own organisation were identified.

As transformational partnerships take time and results may only be visible in a long-term perspective, there is a constant need to persuade, communicate and explain the project internally.

Lack of internal alignment, recognition and management support can result in the partnership not realising its full value.

Finally, difference in time horizons should be identified and managed. The time horizon for businesses is normally shorter and more results-oriented.

CSOs operate with a long time span as development and local involvement take time. Unrealistic project plans create unnecessary frustration and pressure on the organisations.

The local organisations, especially the implementing parties, have to have a major say in setting the project plan and adjusting the actions plans to match local circumstances.

Finance

Both partnerships experienced challenges in the implementation stage, which could not have been properly addressed without financial flexibility.

Thus, the project budget should be flexible enough to accommodate adjustments during the implementation stage.

Implementation

Both of the evaluated partnerships have been subject to a number of risks and unforeseen situations throughout the partnerships.

Transformational partnerships consist of many unknown and unexpected situations that can all jeopardize the reputation, sales, operation and local relationships of the organisations involved.

Both partnerships have witnessed many of the challenges and risks identified in the partnership literature, specified on page 17.

Reputational risk, organisational resistance and stakeholder alienation are some of the risk areas raised during the evaluation process. The key learning here, shared by all of the evaluated organisations, is that risks must be addressed and mitigated as an ongoing activity throughout the partnership.

Communication

Communication is also identified as a recurrent challenge. This is partly due to insufficient alignment of expectations throughout the duration of the partnerships

and especially during the initiation and implementation stages and partly due to lack of transparency in sharing information on internal key concerns, changes, project expectations and data.

Communication is also challenged by mistrust between and a lack of understanding of the competencies of the involved partner organisations.

Sufficient resources should be set aside for scheduled and frequent meetings where all parties participate so that information flows freely between all parties at all times.

Monitoring and evaluation

Finally, for both partnerships the evaluations underlined the fact that learning is a key part of a transformational partnership and should not be underestimated.

Because of this, there is a clear need for evaluating the partnership itself and not just the project.

This evaluation should be done at regular intervals to ensure that the relationship between the involved organisations is efficient and proceeds in a good atmosphere, that expectations are aligned and, if necessary, adjusted.

The learning opportunity throughout the partnership should be seen as a valuable asset for all of the organisations involved when assessing the potential of developing their organisations and improving the design of future partnerships.



9 - FIVE KEY CONCLUSIONS

This report has been a journey in understanding transformational partnerships. It is an important one because transformational partnerships are perceived as an essential part of the solution to many of the complex and significant challenges facing the world in terms of poverty, climate change, pollution, unemployment and hunger.

Despite this, transformational partnerships only account for 1 percent of CSO-business partnerships in Denmark (Neergaard, Crone Jensen & Thusgaard Pedersen 2009). The 99 percent are made up of transactional partnerships characterised by exchange of assets or resources, and realised by communication and marketing activities. Transactional partnerships have their merits – otherwise they would not be as plentiful as they are – and they can be strategic for both the CSO and the business. They have an important role to play and they will no doubt continue to do so.

However, the proliferation of transactional partnerships can make the life of transformational partnerships difficult. Because of these, many CSOs look at businesses as only a source of funding and many businesses view CSOs as a way of gaining brand value and goodwill. This historical motivation is still present in the understanding of the roles of the two parties and represent a fundamental barrier in creating transformational partnerships. Being aware of this and acknowledging that working with transformational partnerships requires new approaches, new governance structures and new ways of working is a key step in overcoming this.

This report has shown that there are multitudes of challenges that will have to be overcome and key learnings to be reflected in order to realise the full potential of transformational partnerships.

A multitude of guidelines, frameworks and models has already been developed to assist CSOs and businesses with this.

However, as the literature review has shown, currently no model exists that addresses all the challenges, risks and stages that a transformational partnership goes through.

Based on the key learnings throughout the report, five overall conclusions when working with transformational partnerships have been identified and are presented below.

REMEMBER IT IS NOT BUSINESS AS USUAL

Transformational partnerships are not business as usual for any of the involved parties.

The innovative nature of the partnership makes the importance of agreeing on a common and shared objective even more important than with normal projects or collaborations. This is because the drivers behind the partnership are different, for instance the CSO looking to enhance literacy in a local community and the business to developing a market opportunity. This highlights the need for selecting the right partner and ensuring that there is a strategic fit.

The partners need to agree on a common approach, to establish a framework and processes that are tailored to

the project and to adjust to new ways of operating or doing business. This should be done as early on in the partnership as possible.

This is, however, often not the case. Instead, the partnership is disproportionately influenced by either the CSO or the business approach. This is, for example, often seen in CSOs not utilising their core competencies in relation to experience with and knowledge of local conditions, needs assessments and engagement of local beneficiaries.

Assessing needs and engaging local stakeholders can be time-consuming and troublesome. Not something, that most result-oriented business are fond of.

CSOs can feel pressured to take a more ‘light’ approach to this in order to live up to the business’ expectations. This is worrying, however. Because it is exactly these things that are the CSO’s core competencies and what the business needs. Not to speak of the beneficiaries.

The business should respect that assessing needs and engaging local stakeholders are essential in a transformative partnerships and that resources should be allocated to this, even if it may take longer.

CSOs, on the other hand, should embrace the new perspectives that businesses can bring. Especially in the form of new and innovative ways of addressing challenges.

A sustainable way of tackling a societal challenge may

be market-based, for instance, in the form of a user pay system. That does not make it less useful for the CSO.

The *not-business-as-usual* aspect also come into play when it comes to the organisational anchoring. Transactional partnerships focused on philanthropic or marketing activities are often located in CSR or marketing departments. Often also with good reason.

“The personal relationship is alpha and omega!”

- Respondent

However, as transformational partnerships are inherently different they should not by default be located in these departments. An assessment of how best to achieve the purpose of the partnership and what competencies are needed should drive the decision on how the partnership is anchored in the organisations. It requires careful case-by-case considerations with a view to other forms of value resulting from such partnerships than funding.

In addition, due to the nature of transformational partnerships not being business as usual, there will be many unknown and unexpected situations. Situations that can jeopardise the reputation, sales, operation and local relationships of the organisations involved.

Thus, risks must be addressed and mitigated as an ongoing activity throughout the partnership.

INVOLVE LOCAL PARTNERS AND BENEFICIARIES

Simply put, beneficiaries and other local stakeholders are involved too little and too late.

That is the learning across the board from business to CSO to beneficiaries to other local stakeholders. Transformational partnerships are largely the result of decisions made at the headquarters.

The result of this is inefficient implementation processes, unmet expectations and suboptimal value creation. The CSO and business must engage with their local partners early in the process to establish needs and possibilities and feed these into the project design.

Further, transformational partnerships take time. New ways of doing business takes time.

Unrealistic time and action plans create unnecessary frustration and pressure on the organisations involved. Therefore, the local partners, especially the implementing organisations, have to have a major say in setting the time plan and adjusting the actions plans to match local circumstances.

It is also important to remember that because the Danish CSO sees a strategic fit in entering into a partnership and has the resources to do so, the local organisation that is instrumental in implementing the project and thus achieving the desired impacts may not. They may not have the time or labour to assist with the implementation nor see the strategic value of doing so. This underlines the importance of involving the local partners as early in the process as possible.

The same goes for the business if it has a local organisation. The local organisation must be included early in the process to ensure internal buy-in to the partnership and that the resources are available for implementation.

When involving and utilising the competencies of the local partners it is important to bear in mind that a CSO and a business differ significantly in terms of their organisation structure.

A CSO has strong and independent local organisations that have their own strategies, manpower and budgets. A business has a strong headquarter that sets the strategic direction and provides the budget for the local organisations. This difference in organisational structure will need to be taken into consideration.

Finally, but most importantly, is involvement of the beneficiaries. They are what the transformational partnerships is fundamentally about. It is about improving the lives of vulnerable people. If not their lives then at least some of their living conditions.

It is a long-standing tradition and fundamental approach of CSOs to engage closely with their beneficiaries.

However, this is often given a lower priority in partnerships due the businesses' need to seek quick progress and results.

This is a fundamental weakness of many partnerships. It increases the risk of gaps between the project plan and reality on the ground resulting in costly and frustrating delays, jeopardises the capacity building and ownership among the beneficiaries and weakens thus the intended positive impacts for the local beneficiaries.

ASSESS AND AGREE ON NEEDS

Transformational partnerships aim at tackling some of the most challenging social or environmental conditions. It seems natural then to start out by assessing these conditions and what the needs are.

However, partnerships appear most often to be developed and implemented on the basis for what the business wants or what is obtainable.

Unfortunately, a needs identification is not always conducted. That also makes it very difficult to assess what the benefits or impacts of the partnership are – except perhaps for the parties that have entered into the partnership.

A transformational partnership should be based on an assessment of the actual needs of the intended beneficiaries.

This may be easier said than done, as the beneficiaries in transformational partnerships can vary from the traditional groups that CSOs or businesses normally address.

CSOs mostly focus on the most vulnerable groups in society and offer longer-term development and humanitarian support to the most needing and poorest groups. Businesses, on the other hand, are mostly interested in targeting stakeholders that are within or close to their value chain.

These target groups can be overlapping but most often, they are not. This difference in target group creates challenges when it comes to identifying shared objectives and defining the strategic fit of the partnership.

It is therefore essential that there is a clear understanding of who the beneficiaries are and why.

GET THE RESOURCES AND FINANCE RIGHT

Tackling the elephant in the room up front is always advisable. Ideally, a transformational partnership is established on the basis of how to best achieve the objectives of the partnership, and often the budget is agreed upon afterwards.

However, this is not how the world works. Most often, the business will have an idea of the amount of money that they are willing to invest in the transformational partnership and the project is then designed according to that budget.

This approach frequently puts the needs of the beneficiaries and the objectives of the partnership second. To avoid this situation and to create the intended impact with the project, there needs to be a degree of flexibility in order for positive impacts and not budgetary limitations to come first, when designing the project.

Inputs regarding funding varies among the companies and CSOs that have provided input for the report. What is clear is that there is a need for a dedicated budget allocated to a transformational partnership project from both company and CSO, as it will require significant resources in respect to time and other resources. How these costs are covered varies across the partnerships we have explored for this report, both among companies and among CSOs, as well as between the partners in a given project, as funding models often are



fundamentally different in companies and CSOs. Thus, a transformational partnership has to adopt an open and transparent approach, when discussing the project budget and expectations linked hereto, and then budget for administration and project management costs realistically and accordingly.

Another aspect of funding is in terms of third party funding. Many transformational partnerships are dependent upon third party funding from governmental agencies.

When asked why, the parties state that the transformational partnership would not have been established if they had not received the funding. It is important to be aware that third party funding comes at a cost and that cost is bureaucratic project management, implementation and reporting processes. These processes can hinder the speed and flexibility of the partnership.

It is worth considering whether this funding does not prove too expensive in the end.

ENSURE MANAGEMENT BUY-IN AND INVOLVEMENT

That transformational partnerships are not business as usual also has consequences for the people working with them.

It is the experience of many of the respondents that their organisations not always appreciate the potential of transformational partnerships, and that they are not prioritised. This leads to a constant need for the involved people in the CSO and the business to internally explain the value of the partnership. Resources that could be

spent on the actual partnership.

It is therefore critical that the involved organisations have backing from their management to engage in transformational partnerships and that this is consistently communicated to the organisation.

This communication should include a clear message as to why transformational partnerships are important to the individual organisation.

If the message – or the underlying business case – is not tangible, it may be best not to establish the partnership.

Further, as transformational partnerships require new ways of thinking and working, the personal relationship becomes crucial.

Transformational partnerships will usually, due to their innovative nature, face unforeseen challenges urging the partners to adjust to new situations and find new solutions.

To tackle this situation, trusting relationships in which issues can be addressed upfront and in open dialogue are key to success. That means taking the time to establish personal relations where the partners really get to know each other, their motivations and risks. It may take precious time and resources but it is worth the investment.

Another key learning from the evaluation process is the need to appoint a project manager from each organisation with the mandate to act and make day-to-day decisions.

Partnerships where too many people are involved or where the project manager has changed several times during the partnership suffer from discontinuity, which

creates confusion in decision-making and the implementation of the project.

Finally, working with transformational partnerships requires distinct competencies. Competencies such as business development, project management and commercial insight.

These competencies are less relevant to transactional partnerships. As previously mentioned the vast majority of partnerships in Denmark are transactional and made up of philanthropic and marketing activities.

These are activities where strong competencies within branding, communication and PR are essential.

However, transformational partnerships are inherently different from transactional and thus other resources are needed.

This is not always reflected in the people that are working with partnerships, which could prove a hindrance in achieving the full potential of the transformational partnership.

Planting a symbolic tree with water drawn from a Lifelink installation in Kenya.

Photo © by Jakob Dahl

10 - CONTRIBUTORS

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Partner



Third party sponsor



Case partners



Contributors



Global good cases

IKEA Foundation
Oxfam America
Save the Children Sweden

Swiss Re
WSUP

11 - METHODOLOGY

The methodology of this report is presented for each research category in the following section.

1. Assessment of existing academic literature in the research field around strategic CSO-business partnerships, including management studies, organisational and institutional studies, development studies as well as social, environmental and economic impact studies.

To conduct this part of the assessment, materials were initially identified through key words searches performed on the Emerald Insight, EBSCOHOST and Google Scholar databases and search engines.

No linguistic, geographical or temporal restrictions were enacted on the results. However, emphasis was put on English and Danish materials published within the last decade (2004-2014).

The search results were then screened based on titles and abstracts.

Materials interpreted as having little or no relevance to the content of the report were excluded from further scrutiny.

Materials identified as having some or significant relevance to the content of this report were retrieved and then read in full-text.

The bibliographies of these materials were then cross-examined to ensure that materials most commonly referred to were included in the review as well.

The aim of the review was to establish:

Types of CSO-business partnerships

Challenges and risks associated with CSO-business partnerships

The different development stages partnerships go through.

2. Assessment of non-academic reports, models, guidelines, frameworks, etc. in the field of strategic CSO-business partnerships.

To conduct this assessment, materials were identified through a structured web-based keywords search strategy applied on the Google search engine.

Ten keyword searches (including abbreviations, initials, acronyms and synonyms) were performed with no linguistic, geographical or temporal restrictions.

For every keyword search, the first 75 search results were retrieved and subsequently scrutinised.

Finally, in order to retrieve published materials, pdf-file restricted searches were performed on all ten keywords.

The aim of the assessment was to complement and provide the academic review with non-academic in-sights.

3. Identification and review of partnership models for strategic CSO-business partnerships.

Initially, materials were identified through a structured web-based keywords search strategy applied on the Google search engine.

Ten keyword searches (including abbreviations, initials, acronyms and synonyms) were performed with no linguistic, geographical or temporal restrictions.

For every keyword search, the first 75 search results were retrieved and subsequently scrutinised.

In order to retrieve published materials pdf-file restricted searches were performed on all ten keywords.

Then the webpages of significant international players from the various sectors (e.g. UN Global Compact, OECD, WWF, and Deloitte) were examined in order to identify partnership models for strategic CSO-business partnerships that had been missed through the search strategy.

All identified models for strategic CSO-business partnerships were pooled and ten were selected based on impact (with cross-reference as the indicator) and sectorial inclusiveness (i.e. all sectors in terms of authors and intended recipients were included in the selection).

A review was performed on these ten models.

The aim was to establish the extent to which the models for developing, building and sustaining strategic CSO-business partnerships that are available now, address and/or provide guidance to:

1. All the stages CSO-business partnerships go through
2. All the challenges and risk that are inherent to most partnerships.

We argue that there are two ways, in which a partnership model may address a challenge. Either the model provides:

- factors or checklists to consider from initiation of the partnership to circumvent the challenge; or
- guidance within the partnership building process that will eliminate the rise of the challenge.

It should be emphasised that the models identified and analysed do not altogether represent a complete picture of available written instructive guidance on CSO-business partnerships.

Rather, it is a selection made with the aim of ensuring broad representation and diversity in terms of contributors (all sectors are represented) and intended recipients (models focusing on the CSO perspective, the business perspective, and the mixed perspective are included).

4. International good cases

The three international cases have been selected to ensure:

High level of strategic integration and value creation for both the CSO and the business involved

General awareness of the partnerships
Representation of different industries, businesses and CSOs involved in the partnerships

Geographical spread in developing countries concerning the partnerships' beneficiaries.

Semi-structured telephone interviews were conducted with representatives from the CSOs and businesses based on the developed evaluation framework presented on page 27.

5. Partnership Arena

The Partnership Arena assembled two times during this project phase. The first meeting focused on validation of the theoretical findings and identification of key challenges in partnerships relationships. The second meeting focused on validation of results from the 360-degree evaluation process and input to key findings.

The Partnership Arena gave input on good practice through the following activities:

Validation of theoretical findings and definition of key challenges

Self-assessment in the form of an online survey conducted by eight members

Individual follow-up interviews conducted with four members

Validation of findings from the 360-degree evaluation process and definition of additional critical factors that must be achieved in order for a partnership to become a success.

The self-assessment and the individual interviews were based on the same questions that were used in the evaluation framework presented on page 27.

The survey provided inputs on the degree to which the respondents felt that their partnerships sufficiently addressed the different elements included in the survey.

The survey respondents were:

Carlsberg Group, Danish NCD Alliance, Fairtrade Mærket, H&M Conscious Foundation, Novo Nordisk A/S, Red Barnet, SOS Børnebyerne and TOP-TOY. The following four were selected for follow-up interviews to dive further into their answers: Carlsberg Group, H&M Conscious Foundation, Novo Nordisk A/S and SOS Børnebyerne.

6. Learning Report

This Learning Report has been drafted by Deloitte Sustainability based on input from the members of the Partnership Arena, the Advisory Board and the case partners.

These stakeholders have also had the opportunity to comment on draft versions of the report.

Danish Red Cross has conducted the final approval of the report.



Doctors in the maternity ward at
Simon Bolivar Hospital,
Barranquilla, Colombia
Photo © by Novo Nordisk

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