Cass Business School
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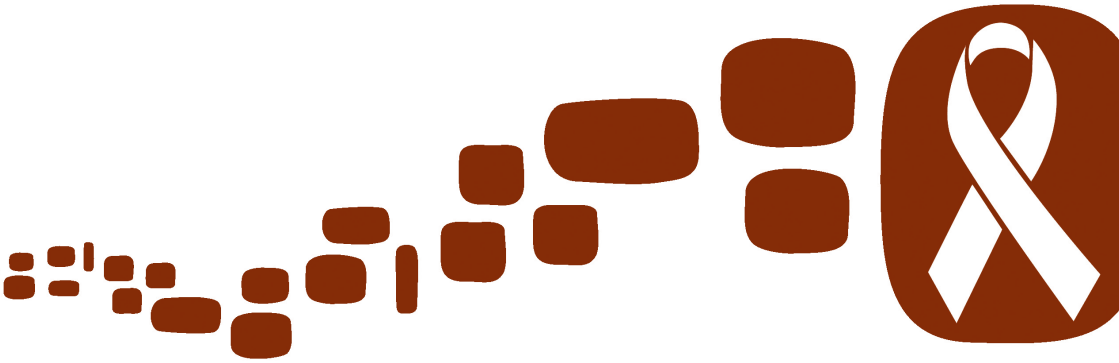
9. Connect

Tools for success:
doing the right things and doing them right



Centre for Charity Effectiveness

Intellectual leadership: developing talent, enhancing performance

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About this guide

Understanding the connections between what you do and the work of others is essential to improving your overall effectiveness and making the most of limited resources.

Effective networking provides assurance to yourselves and to funders that you are not investing in activities that others can do more effectively. It also allows you to learn from others, share your expertise and experience, as well as raise your profile and market your work.

This guide will help you identify connections and develop relationships with other groups and organisations who are doing work which could complement yours. It covers identifying and mapping players; developing networks; and raising your profile and marketing what you do.

Connect: who is in your network?

When considering who could be in your network:

- Assess the external environment, see the **Direction guide**; are there emerging trends or players which might impact on your activities and existing networks?
- Think widely about all the different aspects of your organisation's activities, not just the main services that you provide. This may include back office activities such as payroll, training, IT or administration
- Then list other organisations that also work in these areas and might potentially have an interest in working with you. For example, other organisations will have training and administration functions and might be interested in working closely with you in these areas; or there may be companies with extensive IT support systems who might be interested in sharing these with you
- There may also be organisations that provide similar or complementary services to the same group of beneficiaries who may see value in working more closely with you to improve their service delivery.

How to identify and map other players

Having listed who is in your network, this framework will help you focus on other players that may be worth your considering working more closely with. An 'other player' analysis is a vital first step in mapping out who else is operating in the area in which you are interested in cooperating – see table on p.4.

Analysing key players

Draw up a table (see below) and list all the organisations or groups external to your organisation that could be perceived as other players in relation to the activities you undertake or the services you provide.

For each player categorise how useful you could potentially be to them and how useful they could be to you according to High (H), Medium (M), Low (L).

Name of key player	Degree of interest in us (H/M/L)	Degree of Influence over us (H/M/L)	Key player expectations and needs	Attitude to our performance

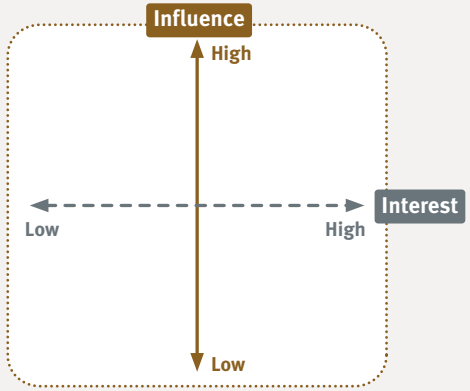
You can then use the 'Influence vs. interest matrix' on the opposite page, with the contents of the table above to map each stakeholder's interest in and influence over your organisation.

This will give you an overview of who else is operating in your area of work and how interested in or influential they may be with regard to your work.

Those organisations who rate highly and whose expectations and needs you think you can and should meet may be worth approaching, in order to consider the possibilities of closer cooperation.

Mapping influence vs interest

Influence vs interest matrix



Mapping the territory

Mapping the territory of your organisation focuses on the core services you provide to beneficiaries. It involves identifying the areas where your services overlap and the areas where you are distinctly different from others. You can do this by firstly listing all the other players who provide similar services, their beneficiaries, their values and approach. You should include your own organisation in this listing. You can then draw some comparisons between what you and others do.

The table on p.6 is a framework for this.

You can map territory on a graph choosing two key aspects of service for the axes and mapping other players accordingly (see p.7).

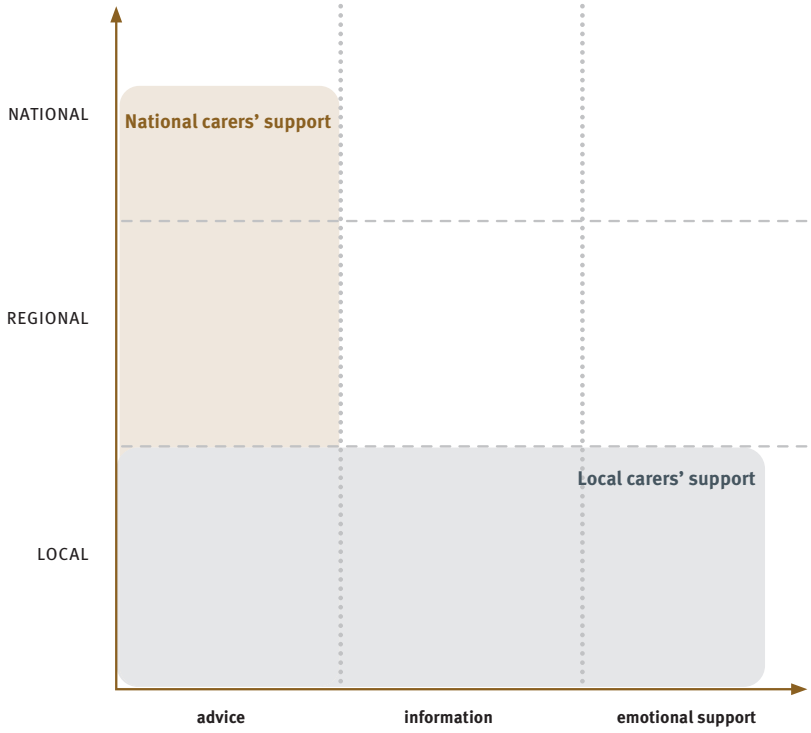
Framework for mapping territory

Other players	Their services	Their beneficiaries	Their values and approach	Similarities and difference with us

Us	Our services	Our beneficiaries	Our values and approach	How are we similar to other players and how are we different

The example below shows how two organisations working in the field of information and support for carers might overlap in terms of providing advice and information for local carers. However, the mapping also shows that they are distinctly different, one providing a national service and the other providing emotional support.

Example of using a graph to map territory



Compete, collaborate or complement?

Managing overlaps

In deciding how to manage overlaps consider:

- Which approach will best achieve your mission?
- Which approach will make best use of resources?
- Which approach will have the greatest impact for your beneficiaries?

Compete

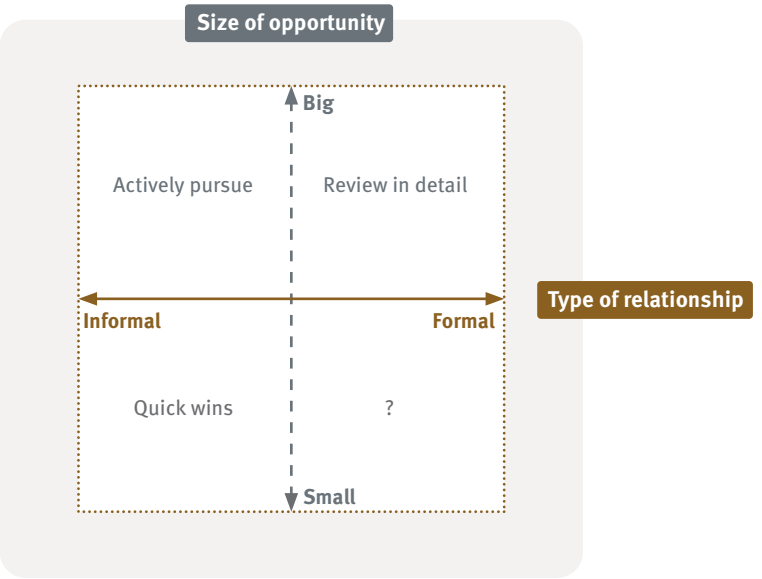
If you believe you provide a better service than others, you may decide to directly compete with other organisations for resources, beneficiaries and support. If you pursue this approach, be clear about what it is that you provide which is unique and distinctive and how this benefits your service users.

Collaborate

It is important to be clear why you want collaboration and what results you seek. Taking all the players you have identified, plot their positions on the matrix on the right. Base this on your assessment of:

- The size of opportunity offered by working together
- How formal or informal the relationship needs to be.

This should inform how much work will be needed to make it happen.



Formal collaboration

You may believe that you can provide the best service by working together with other groups or organisations, for example by holding joint public events, sharing administrative support, collaborating on a campaign or sharing staff training. Before entering into a collaboration, agree the role of the individual organisations. This might include who will be responsible for paying any bills resulting from the collaboration, who will be the key point of contact for enquiries and how any rewards resulting from the arrangement will be distributed.

Informal collaboration

Informal collaboration is an alternative and most frequent form of working together, although not always recognised as such. It is unlikely to involve any legal contracts or formality, although sometimes you may be able to share costs, for example with advertising or simple event management, shared venues etc.

Whilst informal collaboration can be undertaken by two charities, it is not unusual to find that larger numbers/groups of organisations are involved. These groupings may be regional, area-based, have potential beneficiaries or impact in common, or take the form of a special interest group.

Successful informal collaborations enable organisations to retain their identity and remain separate. It is a low-cost option offering modest benefits and occasionally more substantial breakthrough opportunities.

There is a range of guidance on collaborative working available from NCVO: www.ncvo-vol.org.uk

Complement

Alternatively, you may decide that developing different but complementary approaches might be appropriate. For example, in the field of homelessness, Centrepoint provides accommodation-based services for homeless young people, whilst Shelter provides advice, support and campaigns on housing issues but does not provide accommodation. Both organisations are working in the same field of homelessness, but offering complementary services.

In order to capitalise on your collaborative efforts you need to understand your current position in the market so that you can position your resources and operations in a way that optimises your effectiveness and complements the work of other providers. To achieve this will require information about key players, beneficiary groups, types of services delivered and geographic reach. Ask questions such as ‘what is unique about each provider?’

It is not always the simplest option, but may be less complex to implement provided you have done enough research and planning.

You may find that you do not need to directly approach the other nonprofit organisations and that you have the information you need to plan complementary work. But it will always be useful to meet; it can lead to longer term unanticipated benefits. Keep your management team and Board involved, so they too can spot new opportunities for complementing the work of others.

Developing your network

See checklist on p.12 for tips on how to develop your network.

Developing your network

1. Invite feedback on your services

- ☐ Feedback from key players on how well you are doing is always useful. Use interviews, questionnaires or telephone discussions to make contact and find out how others perceive your services and where you might learn from what they are doing.

2. Set up visits

- ☐ Invite other players to visit your organisation to meet staff and volunteers and to see how you operate. Consider holding an 'open session' where people can informally drop in and talk to staff and see how your service works.

3. Attend relevant conferences and seminars

- ☐ Keep an eye out for relevant events. If possible obtain a guest list in advance and identify two or three people with whom to make contact. Enjoy the food and discussion but stay focused on your purpose.

4. Join networking groups

- ☐ There are many relevant networking groups for the nonprofit sector; they may focus on a region (e.g. County Durham), specific area of interest (e.g. homelessness) or function (e.g. finance). See signposts on p.17 for more information.

5. Subscribe to trade press

- ☐ Read the magazines and newsletters which are relevant to your work and get involved by writing letters or contributing articles on issues you feel passionate about.

6. Set up an umbrella group or network

- ☐ If, having developed relationships with key players, you find you do want to maintain the links, consider setting up your own umbrella group or network.

7. Develop informal networks

- ☐ Informal networks are important for keeping abreast of developments in your area of work. Invest time in making contact with key players in your field.

Raising awareness – marketing your organisation

What is Marketing in a nonprofit context?

Marketing is about meeting needs and influencing the behaviour of key groups and individuals to help your organisation to deliver its mission. Being able to market effectively is vital to being able to connect with others and to achieve your charitable purpose sustainably.

Through effective and appropriate marketing, you can access hard to reach beneficiary groups, influence public opinion and policy makers and those providing access to a range of sources of income. A key question is how you can ensure the most effective use of your limited resources to 'talk to' people and extend your reach.

How can small and medium sized organisations market effectively with limited resources?

Above all, marketing is an attitude, an outlook requiring an understanding of the importance of knowing and engaging with all the audiences you need to access.

The key building blocks are:

- Clarity
- Commitment
- Capacity
- Capability
- Communication.

Clarity

It is essential to be able to describe and articulate your purpose clearly and briefly, so invest time in distilling your mission statement into something which would work to capture a stranger's attention in a moment or two (see 'How to develop a vision and a mission' in the **Direction guide**).

You need to be able to provide evidence, preferably from outside your organisation, about the need you meet, how effective you are and the impact of the work on meeting need. Hard evidence helps your case (see 'How to monitor and evaluate performance' in the **Operations guide**).

To be convincing and engaging it is also essential to be clear what success for your organisation is, and looks like, in a way that you are able to convey easily to your key audiences.

Commitment

Marketing is effective when it is felt throughout an organisation, championed and led from the top, by the Board and the Chief Executive.

Marketing is truly embedded in an organisation when it is owned and lived by *everyone* throughout the organisation, employees and volunteers alike.

Making marketing happen in your organisation needs a clear, time-bound, measurable action plan.

Capacity

Marketing requires a critical mass of people on the bus, travelling to the same destination, sharing the journey.

A good starting point is a light touch audit of who is already engaged or 'on the bus', yielding:

- What circles of access and influence do they have?
- Where are the gaps?

Uncovering this information through a series of meetings, starting with the Board, is both informative and re-invigorating. It is helpful to think of people holistically in terms of what connections they may have and not confined to their role within the organisation. Everyone has relatives and friends who are employed, or at school, or play sport or belong to some social group; this thinking will provide a rich pipe-line of networking/influencing opportunities.

Capability

As well as having a critical mass of people travelling on the bus, an organisation requires some of those to have certain abilities to make it capable of marketing. These are:

- **Openers** – people who can and are prepared to open doors
- **Influencers** – people who are in a position to influence other potential powerful stakeholders
- **Askers** – people who are comfortable and competent to ask for support for the organisation, whether it be money, or anything else
- **Implementers** – people who will ensure a timely and appropriate process and administrative support of engaging and maintaining that engagement.

Communication

This is the most important and most often neglected aspect of effective marketing; your Board, trustees, members and patrons could have a role.

But before you undertake any marketing activities, take time to carry out an audit of your current communications. Ask your team:

- Who do we communicate with?
- How do we communicate with them?
- How effective is our communication?
- What evidence do we have of this?
- Where are the gaps?

Use your findings in conjunction with what you have established by your investigations about your direction (see the **Direction guide**), your people (see the **People guide**) and your operations (see the **Operations guide**). You will then have a good basis for planning how to approach the different parts of your networks.

In developing your marketing and communications, create a framework which:

- Lists specific audiences or sub-sets of your networks
- Is accessible in its form and media used
- Appeals to both 'hearts and minds'.

Providing evidence of your achievements

As you develop your understanding of the key players and build networks, keep records of discussions and any agreements or e-mails. Develop a database with up-to-date information on other organisations. This will be particularly important if staff, volunteers and trustees change and you need to induct new people. It will also be important if you are applying or looking to use PQASSO or other quality assurance systems.

You can find out more information about broader aspects of marketing on KnowHow NonProfit at: www.knowhownonprofit.org/campaigns/brand

Signposts

Publications

Adirondack S (2006) *Just about managing* (London: LVSC)

Bruce I (2005) *Charity marketing: meeting need through customer focus*

Copeman C, Bruce I, Forrest A, Lesirge R, Palmer P, Patel A (2008) *Tools for tomorrow* (London: Cass Business School/NCVO)

Websites

KnowHow NonProfit combines expert knowledge with real-life experiences on all aspects of networking for charities: www.knowhownonprofit.org

Small Charities Coalition is designed to help organisations and share resources: www.smallcharities.org.uk

Volresource. This website includes free briefings, guidance and information on all aspects of charity management: www.volresource.org.uk

VSSN (Voluntary Sector Studies Network) focuses on voluntary sector research: www.vssn.org.uk

Courses and networks

Cass Centre for Charity Effectiveness offers training in many aspects of management which include networking. CCE also holds regular charity talks and seminars. These events attract leading figures within the sector and represent a great opportunity to network: www.cass.city.ac.uk/cce

Local CVSs often provide sound short courses on different aspects of running an organisation. Your local CVS may also know about local networks. To find your local CVS go to: www.navca.org.uk

The Guardian Voluntary Sector Network is a space for professionals in the sector to network: www.guardian.co.uk/voluntary-sector-network

NCVO facilitate a range of networks: www.ncvo-vol.org.uk

Links to PQASSO

PQASSO is the practical quality assurance system for small organisations designed by Charities Evaluation Services. Independent data suggest PQASSO is by far the most widely-used quality system in the nonprofit sector. For more information, see www.ces-vol.org.uk

Following this guide will help you to meet several of the indicators of PQASSO quality area 10 (Networking and partnership) in the second edition, and PQASSO quality area 10 (Working with others) in the third edition of the framework.

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Tools for success: doing the right things and doing them right

1. Introduction
2. Self-assessment
3. Compliance
4. Governance
5. Direction
6. Finance
7. People
8. Operations
9. **Connect**

Cass Business School
In 2002, City University's Business School was renamed Sir John Cass Business School following a generous donation towards the development of its new building in Bunhill Row. The School's name is usually abbreviated to Cass Business School.

Sir John Cass's Foundation
Sir John Cass's Foundation has supported education in London since the 18th century and takes its name from its founder, Sir John Cass, who established a school in Aldgate in 1710. Born in the City of London in 1661, Sir John served as an MP for the City and was knighted in 1713.

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