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Connect

Tools for success:

doing the the right things and doing them right

[Centre for Charity Effectiveness]

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USING THIS GUIDE

Links to suggested reference sources and useful materials are provided as embedded links throughout the pages of each ‘Tools for success’ guide and in every Signposts section. Wherever a link is provided, when you hover your cursor over the text you’ll see the link URL show up – click on it to go straight to that source material or website. For example: [Centre for Charity Effectiveness](#)

Common symbols

We have used some common symbols throughout the ‘Tools for success’ series, to highlight different elements:

- ! Notes and tips
- ✓ Checklists of things to do
- ❖ Simple to use tools and sample activities to work on together
- ▶ Signposts to more information, for when you’re ready to build on the basics

Each guide also includes a Glossary of common terms used throughout the Tools for success series. Some terms included in the Glossary may not appear in the content of every guide.

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 working alongside others and being mindful of 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 other key players
- Developing networks
- Raising your profile and marketing what you do.

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Connect: who is in your network?

There will be many reasons for considering connections beyond your organisation.

Ultimately the benefits may include reducing costs, providing better services and increasing your impact. When considering who could be in your network:

- Assess the external environment (see also the **Direction** guide). Many organisations have been going through radical changes and it is important to consider current and emerging trends, opportunities and threats, and the existence of other players, all 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. These may have changed with the greater use of technology and remote working, and new products, services and markets may have emerged. This may indicate a need to seek out new contacts and relationships.
- Consider whether you might arrange to share back-office activities such as payroll, training, IT, finance, bookkeeping or other aspects of administration with another organisation, for efficiency and cost savings. See the section on collaboration below.
- There may also be organisations providing similar or complementary services to the same group of people you work with, and who may see value in working more closely with you to improve their service delivery.

How to identify and map other key players

Listing who is in your network will help you focus on other organisations with whom you may want to consider working more closely. A 'key player' analysis is a vital step in mapping out who else is operating in the area in which you are interested in cooperating.

❖ 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 'key players' in relation to the activities you undertake or the services you provide now and in future.

For each key player rate their potential degree of interest in your organisation, and potential degree of influence over you, using High (H), Medium (M), or Low (L). Consider also their expectations, needs, and attitude to your organisation's performance.

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

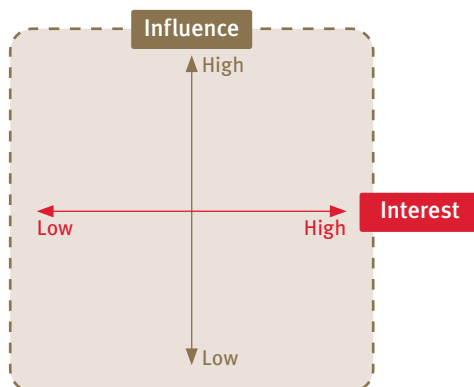
You can then use the 'Influence vs. interest matrix' below, with the contents of the table above to map each stakeholder's interest in and influence over your organisation.

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



How to identify and map other key players

MAPPING THE TERRITORY

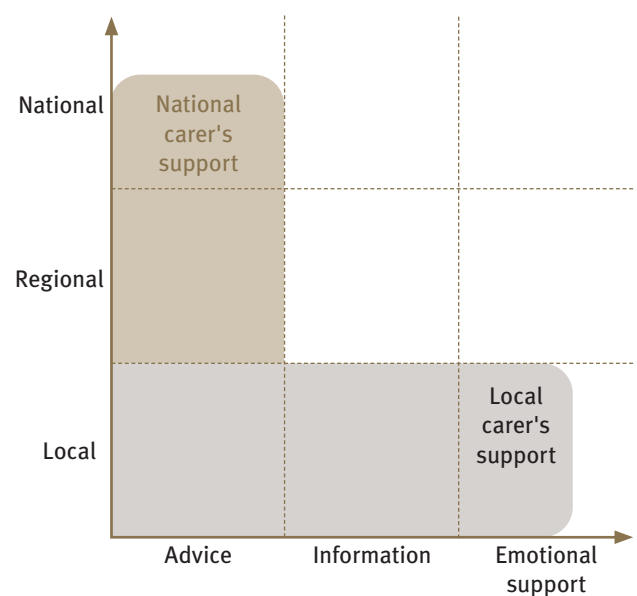
Mapping the territory of your organisation focuses on the core services you provide to the people with whom you work. It involves identifying the areas where your services overlap and the areas where you are distinctly different from others. You can do this by firstly listing all the other players who provide similar services, people they work with, 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.

FRAMEWORK FOR MAPPING TERRITORY

Other players	Their services	People they work with	Their values and approach	Similarities with and differences to us?
Us	Our services	People we work with	Our values and approach	How are we similar to other players and how are we different?

You can also map territory on a graph choosing two key aspects of service for the axes and mapping other players accordingly. The example opposite 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 on the people with whom you work?

COMPETE

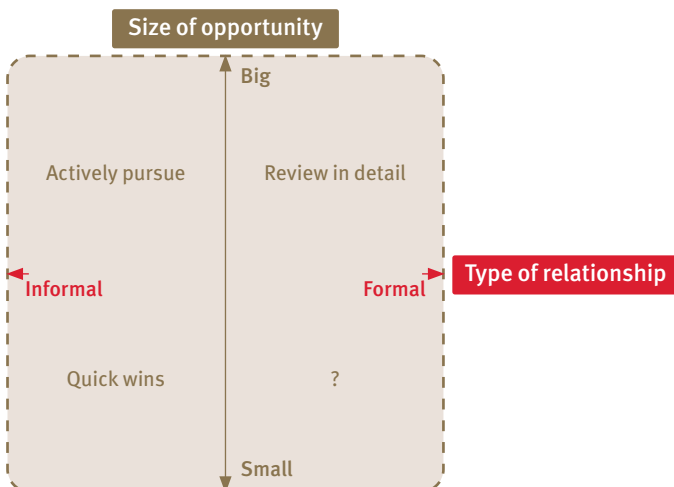
If you believe you provide a better service than others, you may decide to directly compete with other organisations for resources, people you might work with, and support. If you pursue this approach, be clear about what it is that you provide which is unique and distinctive and how this benefits the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

COLLABORATE

It is important to be clear about why you want to collaborate and what results you seek. Taking all the players you have identified, plot their positions on the matrix below. 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 or volunteer training. Before entering into a collaboration, agree the role of the individual organisations involved, e.g. who pays any bills arising from the arrangement, who will be the key point of contact for enquiries and how any rewards arising from the arrangement would be distributed. Effective collaboration is significantly about people and trust.

Formal collaboration can also include more complex models including setting up a consortium, joint venture or partnership to bid for contracts. There must be a sound business justification in doing so and it is certainly something that the board will need to consider as it is likely that the risk profile for your organisation will change.

It can be helpful to set out some 'first principles' by which the collaborating parties will aspire to operate, and which detail steps to take and any issues that will need to be resolved.

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 formal, legal contracts, but sometimes you may be able to share costs, for example with advertising, simple event management, or shared venues.

Whilst informal collaboration can be undertaken between two charities, it is not unusual to find that larger groups of organisations are involved. These groupings may be regional, area-based, have potential people with whom you might work 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.

Compete, collaborate or complement?

▶ NCVO has a range of guidance on collaborative working, and see also 'Collaborative Working Made Simple' from Sayer Vincent.

It is important to consider the cost of collaboration; the cost of change, professional fees, dips in productivity as people learn, or as some leave the organisation etc. Collaboration takes time. It requires investment to achieve alignment and integration and for the change to become embedded.

COMPLEMENT

Alternatively, you may decide that developing different but complementary approaches might be most appropriate. For example, the charity Centrepoin provides accommodation-based services for homeless young people, whilst Shelter provides advice, support and campaigns on housing issues but does not provide accommodation. So both organisations are working in a similar field, but offering complementary services.

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

You will need to understand:

- Your current position in the market
- Information about key players
- The people you might work with
- Types of services delivered
- Geographic reach.

You will need to be able to deploy your resources and operations in a way that optimises your effectiveness and complements the work of other providers. You may feel you have all the information you need to plan complementary work, and that you don't need to approach the other charities. However meeting other organisations will always be helpful and can lead to longer-term, unanticipated benefits. Keep your management team and board involved throughout, so that they too can spot new opportunities for complementing the work of others.

The process of considering whether to compete, collaborate or complement may also lead to broader consideration of larger, formal, structured partnerships and strategic restructuring. The nonprofit strategy and collaboration expert, David La Piana, has devised a collaborative map to show the interrelationship of these various options. La Piana's model distinguishes between:

Collaboration: coordinated action with mutual benefit

Alliance: a more formal, structured partnership, doing business together in a joint venture

Strategic restructuring: a structural change or the creation of a new entity.

When reviewing your possible plans, consider where you are against La Piana's model. In general, the nearer the centre of the model you are, the greater the work and risks involved, but equally, the benefits may be greater.

Developing your network

This checklist provides useful 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 online 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 people you work with, to see how you operate. Consider holding an 'open session' where people can informally drop in and talk to people and see how your service works. Promote this in a range of different places to attract those who are not usually included.

3. Keep up to date with relevant events and news:

- Keep an eye out for relevant events.
- Subscribe to journals and newsletters which are relevant to your work and get involved by writing thought pieces and blogs, recording vlogs, following key players on social media and contributing articles on issues you feel passionate about.

4. Develop formal and informal networks:

- There are many relevant networking groups for the nonprofit sector. They may focus on a region, a specific area of interest (e.g. homelessness) or a function (e.g. finance). See Signposts below for more information.
- Having developed relationships with key players, consider setting up your own umbrella group or network so that you can maintain those links and ensure diversity and inclusion.
- Informal networks are important for keeping abreast of developments in your area of work. Invest time in networking with key players in your field – take care about how you define key players to make sure you are not excluding those who think differently from you.

Diversity, Equity and Inclusion (DEI)

When developing your connections, it is important to consider how you can add to and enhance diversity, equity and inclusion (DEI) across the breadth of your network.

Who is missing and not being included in contributing the shared understanding of issues and challenges? Consider the various communities, and who is round the table and who is not. Who might need support to effectively bring their voice to the discussion? What could this support look like, and who might best provide it? In doing this, guard against tokenism by making sure everyone has the same opportunity to give to and get something from the relationship, with a genuine desire to involve and learn from a variety of perspectives.

Remember that support isn't always about providing resources – it might be about asserting your power, standing alongside someone to eliminate barriers to inclusion, or speaking out about inequalities. You can use your experience of working with those who your organisation supports and transfer your learning to others.

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 key to achieve your charitable purpose.

Through effective and appropriate marketing, you can access people you find it hard to reach, 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 best use of your limited resources to communicate effectively with people and extend your reach.

HOW CAN SMALL AND MEDIUM SIZED ORGANISATIONS MARKET EFFECTIVELY WITH LIMITED RESOURCES?

Above all, marketing is an attitude, requiring knowledge of and engagement with all your audiences.

The key building blocks are:

- Clarity
- Commitment
- Capacity
- Capability
- Communication

CLARITY

It is essential to be able to describe and articulate your organisation's Vision and Mission clearly and succinctly, so invest time in distilling these into which will capture someone's attention in a moment or two. See the *Direction* guide for more on developing a Vision and Mission.

You need to be able to provide evidence, preferably from outside your organisation, about the needs you meet, how effective you are and the impact of the work on meeting those needs. Hard evidence as well as stories will help your case.

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

COMMITMENT

Marketing is effective when it truly embedded in an organisation, championed and led from the top, by the board and the chief executive, and 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 for specific people, as well as values and a shared purpose for all.

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', to show:

- What circles of access and influence do they, and therefore you as an institution, have?
- Where are the gaps? Who do you know who can help you fill these gaps?

Uncovering this information through a series of meetings, starting with the board, is both informative and re-invigorating. In this context, it is more helpful to think of people holistically in terms of what connections they may have, rather than 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 pipeline of networking/influencing opportunities.

CAPABILITY

As well as having a critical mass of engaged people, an organisation needs some of those to have certain abilities to make it capable of marketing itself. These are attributes that anyone may have, so set up conversations across the organisation to uncover these special talents and see how you can encourage people to support you in your marketing and communications strategy. Look for people who are:

- **Openers** – people who can and are prepared to open doors
- **Influencers** – people who are able to influence other potential powerful stakeholders

Raising awareness – marketing your organisation

- **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 all have a role.

Before you undertake any marketing activities, take time to carry out an audit of your current communications:

- 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 through consideration of your strategy (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:

- Is targeted at specific audiences or sub-sets of your networks
- Uses the best communications channels to reach your audience
- Appeals to both ‘hearts and minds’.

DIGITAL MARKETING

Your digital marketing approach should work in addition to your other communications activities, like PR, personal and sector connections etc., to make sure you successfully engage with the right audience.

The aim is to build relationships and to connect with people successfully. Using this guide will have helped you understand who is key in your network and the areas for potential growth.

WEBSITE

The website is your starting point, where who you are and what you do needs to be communicated clearly and effectively. To achieve this the content should be updated regularly, and where possible personal stories should be added, as they are a powerful tool to show your impact.

Simplicity and clarity are key, as well making sure all your pages are interconnected, with links to other pages or sections embedded in the website text, and always giving the reader a ‘call to action’, a next step to take or further content that might be of interest to them.

All your communications – for example social media, news stories, emails etc. – should be linked back to your webpages.

COMMUNICATION CHANNELS

Looking at who you want to connect with will help to identify the best channels. For example:

- LinkedIn may work for your professional and business contacts
- Facebook is useful for more casual social interaction and potentially fundraising
- Instagram is a particularly visual channel and a good way to network and share video and photo content
- Emails and newsletters can help you to engage with the part of your audience that already knows and hopefully trusts you.

Keeping your messages simple and reflecting on the ‘5 C’s’ (p. 9 above) are key. Don’t forget, you will need dedicated resource to make this a success and to keep it active, relevant, and up to date. This may be by using an in-house member of staff or volunteer, or by outsourcing it to external experts but there will be a cost to bear in mind here.

Inevitably there are risks both in terms of data security and reputational aspects to keep in view. Data protection/GDPR requirements must be adhered to and a social media policy is also important for your staff and volunteers. See the **Compliance** and **People** guides for more on these.

Providing evidence of your achievements

As you develop your understanding of key players and build your networks, keep records of discussions, emails and any agreements made.

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.

Evidence of your impact is also essential, so ensure you record case studies and successes.

Signposts

Tools for tomorrow (3rd edition 2012 London: Cass Business School/NCVO)

NCVO Knowhow offers a wide range of advice and support for voluntary organisations including a guide to collaborative working

Collaborative working made simple (July 2015). One of a series of 'made simple' guides for charities from Sayer Vincent

La Piana's collaborative working model

Small Charities Coalition is designed to help nonprofit organisations connect and share resources

CASE STUDY

A case study from the New Forest Advice Network is a good example of organisations gaining agreement in advance to the key principles by which their collaboration will operate, detailing the steps to take and issues that will need to be resolved. These 'first principles' are importantly about the people aspects of the collaboration.

Glossary

Clarification of common terms used throughout the Tools for success series. Please note that some terms included in this Glossary may not appear in the content of every guide.

Collaboration: A spectrum of different ways two or more organisations can work together for mutual benefit – such as cost reduction, or to add value for those with whom the organisation works. A collaboration can be formal (a merger) or informal (a network), and it can last for a fixed length of time or can be permanent.

Compliance: Conforming to regulations and legislation (and being able to demonstrate this).

Constitution: The legal document that, in written form, establishes the rules and principles, powers, duties, structures and processes of the organisation.

Diversification: Establishing a broad portfolio (e.g. in terms of services investments or funding streams) in order to minimise risk and create choice.

Driver: A major force or trend that could positively or negatively influence the future of an organisation. Drivers have a complex relationship with each other; some drivers are an outcome of others. Some are reasonably predictable; some are uncertain.

Diversity, Equity and Inclusion (DEI):

Diversity is about recognising and valuing difference in its broadest sense, ensuring that everyone has equitable access to resources and decision making.

Equity is about removing inequalities to make sure everyone has the chance to realise their ambitions. **Equality** is about creating a fairer society where everyone has an equal opportunity to fulfil their potential.

Inclusion is about being proactive to ensure that each individual's experience within the workplace and in wider society is one where they feel valued, respected and fully able to participate.

Evaluation: Using information from monitoring and elsewhere to assess the performance of an organisation or project against its stated aims or outcomes.

Governance: The process of oversight by trustees/board that ensures the organisation works to its aims, uses its assets to pursue those aims and acts at all times in the interests of beneficiaries.

Grant: a one-way, non-contractual, transfer of money or other assets for a social purpose (often charitable but not always).

Impact: All changes resulting from an activity, project or organisation. It includes intended as well as unintended effects, negative as well as positive, and long-term as well as short-term

Induction: An event or programme of activities to welcome, orient and introduce a new recruit (staff, volunteer or trustee) to the structures, procedures, people and culture of the organisation.

Liability: An obligation that may put an organisation at a disadvantage. Often associated with past obligations causing future transfer of assets, delivery of service or other duty, and/or yielding of benefits.

Networking: Exchange of information, knowledge, understanding and experience between people sharing common issues and concerns.

Other players: Any individual, organisation or group that works in the same field as your organisation and/or that has similar or overlapping interests. They could be charities, commercial organisations or statutory bodies. They may also be competitors, suppliers or collaborators.

Outcomes: The changes, benefits, learning or other effects that result from what the project or organisation makes, offers or provides.

Outputs: The direct products, services or facilities that result from an organisation's or project's activities.

Performance indicators: Well-defined information which shows whether something is happening (or not) as a result of actions and/or investment made.

Performance management: A process which contributes to the effective management of individuals and teams in order to achieve high levels of organisational performance. It establishes a shared understanding about the results that need to be achieved, and an approach to leading and developing people which will ensure that they are achieved.

Quality framework: A set of criteria enabling an organisation to apply a rigorous, consistent and comprehensive approach to continuous improvement.

Risk: A potentially damaging outcome of an event or situation

Glossary

Social enterprise: A social enterprise is a business set up to tackle a social or environmental need. Their main aim is to generate profit which can be used to further the organisation's social or environmental goals.

Social finance: Refers to the use of commercial-style investment tools to create a social as well as a financial return.

SOFA: Statement of Financial Activities. A charity's SOFA shows all the incoming resources becoming available during the year and all its expenditure for the year, and reconciles all the changes in its funds.

SORP: 'Statement of Recommended Practice: Accounting and Reporting by Charities', published by the Charity Commission, providing guidance on the format and content of charity accounts and annual reports.

Stakeholder: All individuals and groups who are affected by, or can affect, a given project, programme or organisation.

Statutory body: An institution empowered by the state through legislation to establish policy, regulate, fund and provide services.

Strategic analysis: Considering how the environment is changing, analysing the implications for the organisation, and using this knowledge to make better strategic decisions.

Strategy: A way of mobilising an organisation in its direction of travel: setting direction, analysing what the organisation needs to do, planning, implementing, and evaluating the plan.

Sustainability: The ability or facility to remain robust and drive impact into the longer term: continuing to exist and being maintained at a defined level of strength indefinitely.

Target: The aspired quantity and quality of outputs and outcomes; specific, measurable and time-bound results.

Trading: The exchange of goods or services, or both, through a market, using a medium of exchange such as barter (direct exchange of goods or services) or money.

Trustee: In legal terms, the holder of property in trust on behalf of those the organisation supports. For most nonprofit organisations, trustees are board members with defined duties under the constitution or governing document; the persons having the general control and direction of a charity. A trustee may also be called a 'management committee member' or similar.

CENTRE FOR CHARITY EFFECTIVENESS

Inspiring transformation within the nonprofit sector.

The vision of the Centre for Charity Effectiveness (CCE) is that of a nonprofit sector leading positive social change. We support the sector to achieve this through the services that we deliver: education, knowledge sharing, research and independent consultancy advice. As one of Bayes Business School's centres of excellence, impactful knowledge exchange has been at the heart of what we do since our inception over 20 years ago.

Tools for success series:

Compliance

Connect

Direction

Finance

Governance

Operations

People

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