ZURICH

Sustainability for Not-for-Profits and Charitiable Organisations



Introduction

Sustainability is about how our actions affect our physical environment, but it also has a much deeper meaning.

For voluntary organisations, sustainability is therefore partly about considering ways to reduce carbon footprint, but it can also mean taking appropriate measures to remain on a sustainable financial and legal footing, or using new technologies in innovative ways to meet the evolving needs and expectations of service users.

Ultimately, sustainability needs to be built into everything we do.

This guide covers several specific areas of sustainability:

- Strategy and planning
- People and sustainability
- Financial sustainability
- Legal Sustainability
- Physical environment
- Technology

Each section includes real-life case studies showcasing examples of best practice in sustainability, as well as links to sources of practical help and support for organisations to guide them on their sustainability journey.



Strategy and Planning

Incorporating sustainability into strategy and planning involves a number of considerations.

For example:

- Ensuring sustainability objectives are worthwhile, achievable, and evidence-led
- Making decisions based on reliable, relevant data
- Communicating effectively with both internal and external stakeholders
- Reviewing plans regularly and being open to change and challenge

Measuring targets
Measurement and benchmarking are critical in order to ensure that sustainability objectives have meaning and value. Planning effectively for a sustainable future begins with having a detailed understanding of how your current operations and activities impact people, communities and the planet.

External help
For many organisations, bringing in external experts to help measure and benchmark their current activity has helped them to develop a clearer understanding of the kind of changes that would be most beneficial going forward.
At a strategic level, whatever objectives are set must be achievable. Across the commercial, public and voluntary sectors, there have been examples of organisations setting ambitious sustainability targets and then struggling to implement them, often because their aspiration has not been matched by a coherent strategy, explaining who will be responsible for delivering on the objectives and how they will be resourced and funded.

Frameworks
As with all organisational strategies and plans, putting a robust risk and governance framework in place to support delivery through the mitigation of challenges and optimisation of opportunities will lead to a greater likelihood of successful implementation.



Helpful resources for strategy and planning

Once objectives and plans are set, it's important to make sure they are communicated, managed and reviewed, to keep them up to date. Here are some useful resources that might help on your organisation's journey to incorporating sustainability into your strategy.

Case study: Out There

Statisticians for Society worked with Out There, a Manchester-based charity that supports families of prisoners. This included reviewing how existing data was used, automating certain processes, and providing technical training so the charity could manage its data more effectively going forward. This has helped the charity with day-to-day operations but has also made funding bids more persuasive and evidence-led.



Statisticians for Society

Statisticians for Society is a pro bono scheme run by volunteer statisticians from the Royal Statistical Society. Statisticians for Society helps charitable organisations by providing free, expert data analysis. This can include practical guidance on how to better understand and organise data, and manage databases more effectively.

Statisticians for Society aims to support smaller charities that would struggle to afford or justify the cost of a full-time statistician. Charities with a turnover of less than £1 million are eligible for help, and can apply by completing an online enquiry form.

Creating a sustainability or environmental policy

For charities, finding support to create a sustainability or environmental policy can be a challenge in itself. We've found two sites that we hope you find helpful when creating a sustainability or environmental policy that also includes your charity's aims:

- The Charity Excellence Framework provides a huge variety of free online resources, tailored for small, large, developed, and developing organisations. This includes a free sustainability policy template, as well as more than 50 eco-friendly ideas.
- Fit for the Future also has a 'how-to' guide specifically for charities and not-for-profit organisations

Media and communications support

Communicating effectively is important in order to deliver on a strategy and to engage with the right audiences.

Media Trust and CharityComms are two organisations that can support those in the voluntary sector to improve their digital communications skills. Media Trust and CharityComms have partnered with organisations such as Google and Facebook to provide training courses and other resources. They also help to connect volunteers with media industry expertise to organisations looking for support with their communications strategies.

People & Sustainability

The effectiveness of a sustainability strategy depends upon the organisation's people being willing and able to execute it. Here are some of the ways you can put people at the heart of your sustainability strategy and planning.

Recruitment and retention

Organisations with strong sustainability credentials have a better chance of attracting and keeping the best staff and volunteers.

A recent survey found nearly half of employees and graduates want the organisation they work for to demonstrate a commitment to Environmental, Social and Governance (ESG), and one-fifth have turned down a job offer because an organisation's ESG commitments did not match their own values. Sustainable employment involves considering people's needs holistically, rather than just through the lens of their work. This could involve:

- Ongoing development and training
- Ensuring a flexible and supported work-life balance
- Providing health and wellbeing benefits and support

At the recruitment stage, organisations should consider how they can best showcase their sustainability credentials, for example by incorporating them into job adverts, job applications, inductions and other on-boarding documents.



Diversity, Equity, Inclusion and Belonging

Considering workforce diversity, equity, inclusion and belonging (DEIB) is imperative in order to meet the needs of your people and the communities you serve – and therefore become a more sustainable organisation over the long-term. Best practice approaches in this area typically involve collaboration and engagement with a wide range of stakeholders both inside and outside the organisation.

Again, the recruitment stage is a good opportunity for organisations to emphasise their commitment to DEIB. For example, through practising anonymous recruitment in order to eliminate unconscious bias, incorporating DEIB credentials into job descriptions, and using different channels or connections to advertise roles to ensure they are seen by the widest possible pool of applicants.

In order to understand and improve DEIB within workforces, organisations must first understand their baseline, which requires collecting and collating good quality data. Some organisations in the public and voluntary sectors use online HR systems that allow staff to record their protected characteristics, so workforce data can be collected and collated. Dashboards can then be used to help leaders measure progress over time.

For some organisations, particularly smaller charities, data collection and analysis can be an additional burden on resources. The tools listed in this guide's Strategy and Planning section can help.

Helpful resources for people and sustainability

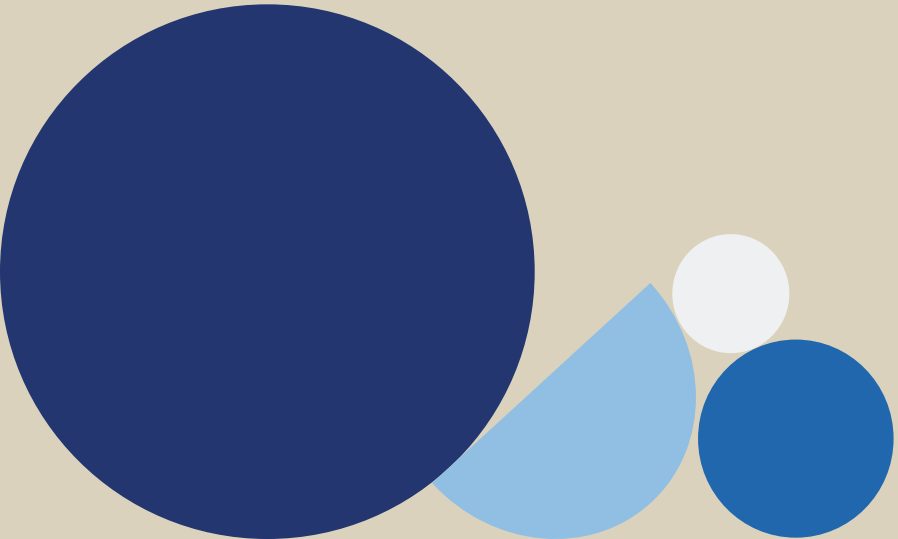
Health and Wellbeing

A recent Zurich article on workplace wellbeing concluded that organisations should think of wellbeing not as "a thing that we do", but as an outcome that comes from improved ways of working.

Small, practical changes can make a big difference. Research from Zurich Municipal's partner, Fika, has found that employees experiencing high levels of burnout are far more likely to report issues such as:

- Being moved from one task to another with little warning
- Regularly attending meetings with no clear agenda or outcomes
- Being unable to use their strengths in their role
- Not feeling connected to colleagues

In addition, where mental health and wellbeing support is provided, take-up is often poor. Ways to address these challenges could include providing training and support to run meetings more efficiently, so that team members have clarity on what they are expected to bring to each meeting, and ensuring that any wellbeing initiatives are delivered in a relevant context - i.e. they relate to the workplace challenges people are likely to face.



Engagement and communication

A recent Zurich Municipal survey demonstrated that it cannot be taken for granted that strategies will be understood and embedded across the workforce. The survey, reported in our whitepaper, The Sustainability Shift: People, found that nearly 60% of people have no involvement in their organisation's sustainability agenda, while 40% are unsure if their organisation even has a sustainability strategy.

One way of building engagement could be to create employee-led green champions or green squads, who could be responsible for sourcing sustainability training, promoting sustainability initiatives, sharing tips, and scrutinising the organisation's sustainability plans. In the same way, employee inclusivity champions or panels can play an important role in promoting DEIB across the organisation, including scrutinising job adverts and the process for selecting candidates for interview.

Organisations must also be able to communicate effectively to external stakeholders, in order to explain what they are doing to become more sustainable. See the Strategy and Planning section for a list of organisations that can help charities with communications advice, training and expertise.

The Carbon Literacy Project is a great place to start. Their purpose is to "advance the education of the public in the conservation, protection and improvement of the physical and natural world". They educate organisations, individuals and trainers on climate change and encourage them to take positive action towards reducing carbon emissions.

You can find out more here - Home - The Carbon Literacy Project.

Financial Sustainabililty

NCVO, a membership community for charities, voluntary organisations and community groups in England, describes a financially sustainable organisation as one "that can consistently support and deliver its mission, making the most of changing markets and funding environments."

In the current economic climate, many voluntary organisations are facing significant financial pressures that could affect their ability to deliver on their charitable purpose.

Organisations often find it hard to see where they fit into the bigger sustainability picture, for example with regards to supporting the UN's 17 Sustainable Development Goals. However, by focusing on what matters to their organisation in their context, charities and other voluntary organisations can make meaningful progress towards becoming more sustainable.

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One of the UN's Sustainable Development Goals is to promote inclusive and sustainable economic growth. By improving their own financial stability and resilience, voluntary organisations can help to ensure they can continue to deliver on their charitable purpose.

Many of the UN's other Sustainable Development Goals – for example, eradicating poverty and hunger (Goals 1 and 2), and reducing inequalities (Goal 10) - also depend to some extent on the ability of charities and voluntary organisations to remain financially healthy and secure.

Case study: Empower to cook

Buckinghamshire-based social enterprise Empower to Cook supports communities through food education, including interactive classes to teach young people about healthy diets. Empower to Cook used the Reach Volunteering platform to connect with a volunteer chartered accountant, who has helped the organisation with its invoices, year-end accounts and cash flow forecasts.

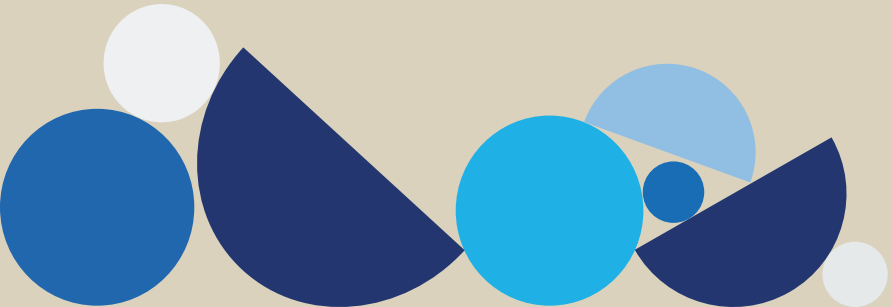
Helpful resources for financial sustainability

NCVO support
The National Council for Voluntary Organisations (NCVO) offers a range of tools and resources to support financial sustainability. The NCVO uses the Sustainable Sun Tool to help organisations measure their progress towards becoming more financially sustainable. The tool considers six areas:

- Strategic approach
- Income diversity
- Financial management
- Communicating success
- External positioning
- Relationships

The NCVO can also carry out financial health checks on charity members to provide a deeper understanding of how and where to improve, e.g. by reviewing recent funding applications, operations plans, and other internal documents. Find out more about NCVO membership.

Centric Community Projects
Lack of space is a challenge for many organisations, and finding suitable space can come at considerable expense. Centric Community Projects is an organisation that has built strong relationships with some of the UK's largest property owners, and is able to provide office, retail or industrial space, whether for working in, hosting events, using as storage or another purpose.
Eligibility is restricted to UK-registered organisations with clear social objectives. You can view available properties or make an enquiry via the Centric Community Projects website.



The Charity Bank
Smaller charities often face barriers accessing traditional finance, as many lenders do not understand the unique requirements associated with the voluntary sector. The Charity Bank is a savings and loans bank with a deep understanding of the specific requirements of charities and social enterprises, and takes a tailored approach towards assessing small loan requests.

Find out more about the Charity Bank's charity loans.

Chartered Institute of Fundraising
The Chartered Institute of Fundraising is a professional membership body that offers free management resources to charitable organisations, including fundraising qualifications, and runs fundraising skills workshops. Find out more about the CIoF, including how to become a member.

Reach Volunteering
The Reach Volunteering online platform can connect charities in need of help with volunteers offering their time and expertise, including in areas such as accountancy, book-keeping, financial management and business development. The platform can also be used to recruit trustees.

Find out more about Reach Volunteering.

Additional resources to support financial sustainability
Among the wealth of tools available in the Charity Excellence Framework's Resource Hub is a detailed guide looking at how to reduce operating costs and expenses, for example by drawing up a contracts management register to review contracts more effectively and identify where you may be overpaying for goods and services.

Visit the Charity Excellence Framework Resource Hub page.

Legal Sustainabililty

Accessing legal services can be expensive for individuals and organisations alike. Charities who offer legal advice are facing increasing demand for their services. The UK Government has announced £12 million of new grant funding for charities who provide legal support.

For charities themselves, access to legal support is critical. Analysis by the Centre for Economics and Business Research has found that charities may be losing up to £1.2 billion a year due to legal issues, with disputes relating to intellectual property, employee issues, and property among the most costly. The same analysis found the average UK charity is likely to encounter eight legal issues each year.



Helpful resources for legal sustainability

TrustLaw
TrustLaw is a pro bono legal service provided by the Thomson Reuters Foundation.

Voluntary organisations who join TrustLaw have access to their own online account where they can submit a request for free legal support from a volunteer lawyer.

TrustLaw also publishes various how-to guides, including on issues such as legal structures and governance. In addition, TrustLaw can also help support organisations' policy and advocacy agendas. Through its legal network, TrustLaw produces in-depth research and analysis on laws relating to social issues such as human trafficking, forced labour, domestic violence, and sexual and reproductive health.
Visit the TrustLaw website.

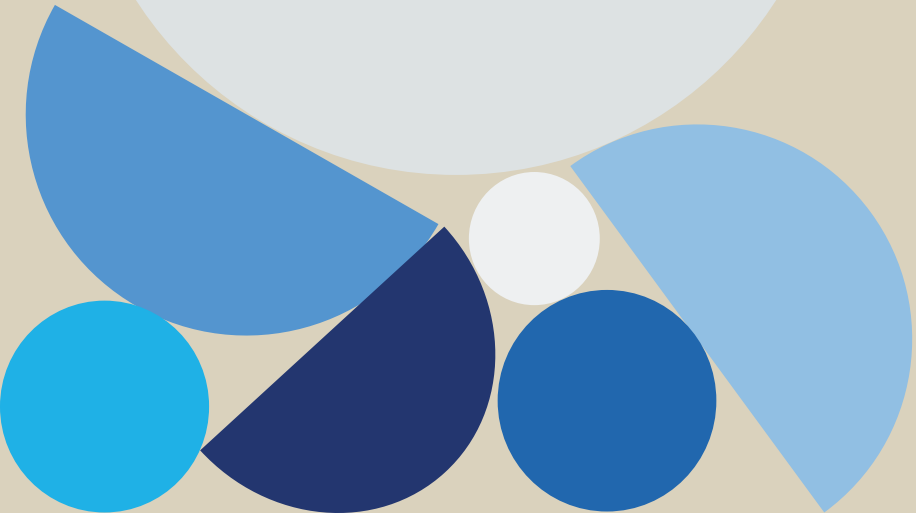
LawWorks

LawWorks, a charity operating in England, links voluntary organisations with pro bono lawyers specialising in various areas of law. Organisations can apply for either one-off legal assistance or ongoing support. LawWorks uses its network of member law firms to try to find a suitable volunteer match.

LawWorks has also produced a free series of short online videos covering common legal issues faced by small non-profits.

Case study:
Healthwatch Islington

Healthwatch Islington aims to improve access to health and care services in the London Borough of Islington. When the charity was in the process of moving premises, it sought help from LawWorks to review the terms of its draft lease. HealthWatch Islington was paired with a volunteer solicitor from law firm Howard Kennedy, and thanks to the advice it received, is now in the process of completing its move.



Child Hope UK

ChildHope UK is a charity that supports thousands of children growing up in some of the world's toughest environments, including extreme poverty and violence.

ChildHope approached A4ID to help source free legal advice in relation to an application to extend a long-term funding programme supporting girls in Ethiopia, through the UK Department for International Development. ChildHope was paired with law firm Allen & Overy LLP, who pored through more than 100 pages of legal documents and provided valuable advice on key details of the terms of the funding.

A4ID

Organisations can get a better understanding of their legal needs, and identify any areas requiring attention, using A4ID's free online legal health check.

After registering and answering some multiple choice questions about their organisation, users will be given some brief legal guidance and suggestions as to areas where they may require legal advice. Register for an online legal health check.

A4ID can also provide support in finding pro bono legal advice.

London Legal Support Trust

The London Legal Support Trust is an independent charity that raises money for free legal advice services in London and the South-East. The charity supports more than 100 organisations across the region every year.

Find out more about the London Legal Support Trust.

Physical Environment

Having a positive impact on our physical environment is undoubtedly one of the most significant ways we can contribute to sustainability. One way to have such an impact is to reuse existing resources, rather than buying or producing new ones.

A number of platforms and projects now exist to help charities and voluntary organisations source useful donated items – from stationery and electronics to toilet rolls – that other organisations either have a surplus of or no longer have a need for. Charities can then use these items themselves or make them available for their service users.

Seeing the bigger picture

Making more effective use of existing resources, rather than buying new, can not only have a positive impact on the physical environment; it can also support other strands of sustainability. For example, it can help charities and voluntary organisations to reduce their costs – improving financial sustainability. It can help them to motivate their staff, members and volunteers, by showing that the organisation cares about its impact on others – supporting people sustainably. It can help make sustainability strategies more achievable – supporting strategy and planning.

Case study: In Kind Direct

Charities and voluntary organisations can also benefit from In Kind Direct's affiliate schemes and partnerships. One, with Ricoh, gives charities access to refurbished photocopier-printers. Another, with the Directory of Social Change, provides charities wishing to become DSC members with 20% off the membership fee.

Helpful resources for repairing and reusing

Ollio
Ollio is a mobile food-sharing app that aims to tackle food waste.

It can be used by individuals, organisations and businesses to connect those with surplus food to others nearby who are in need. Find out more about the Ollio app.



In Kind Direct
In Kind Direct distributes resources donated by UK companies to charities, community groups, food banks and schools who need them. This includes essentials like toilet rolls, personal hygiene products, cleaning and laundry supplies, period products, and baby essentials and clothing. Visit the In Kind Direct website or make an enquiry via info@inkinddirect.org.

Toiletries Amnesty
The focus of Toiletries Amnesty is to alleviate hygiene poverty and reduce waste. It does this by matching those with excess stock of hygiene products with organisations and services that need them the most, such as homeless shelters, mental health teams, family and children's centres, and food banks.
By signing up to the Toiletries Amnesty directory and specifying the items they need, charities and voluntary organisations will be searchable by donors in the area who may be able to help. Find out more about Toiletries Amnesty.

Globechain
Globechain is a platform where businesses and other organisations list items they no longer need. It is particularly useful for charities and non-profits looking for technical items used in a business or institutional setting.

Charities can sign up for free, and then search for specific items or set up alerts so they are notified when the item they need becomes available. Visit the Globechain website.

Warp It
Charities may have items of their own that they no longer need. Warp It (which stands for Waste Action Reuse Portal) is a network that allows organisations to swap and trade resources, such as office chairs and stationery. Voluntary organisations can sign up for free, and then either look for items they need or offer items of their own. Warp It minimises waste by first ensuring that nobody internally would benefit from the items before they are offered externally.

Technology & Sustainability

Technology can have an important role in helping organisations to become more sustainable, but alongside the opportunities there are also challenges.

One example is the use of digital technology to engage with new and existing audiences. On the one hand, communicating via email, online meetings and webinars instead of face-to-face, could help organisations to reach certain audiences more effectively, while also minimising the time, costs and carbon impact associated with travelling or hosting events.

However, at the same time the use of digital technology can also lead to challenges and internal conflict. Many organisations who operate internationally have understandable concerns about how to balance the desire to reduce emissions from road or air travel, while at the same time remaining close to the communities they serve. In addition, communicating digitally has its own carbon impact. Increased internet usage puts extra strain on data centres, which rely on electricity largely generated by fossil fuels. Sending emails with bulky attachments, or storing lots of data on cloud storage systems, ultimately has an impact on carbon emissions. The World Economic Forum says that sending 65 emails produces emissions equivalent to driving a car for half a mile. See the WEF's guide to reducing your digital carbon footprint.

There is another dilemma too. If sustainability is partly about ensuring we can continue to meet the future needs of people and communities, then the more we communicate digitally, the more we risk leaving behind those with poor digital literacy, or those who don't have a computer, smartphone or reliable internet access.

According to the most recent Census, in 2020 more than 6% of UK adults had never used the internet. Internet usage is even lower among certain groups, including people with disabilities.



Helpful resources for technology and sustainability

Hubbub

In partnership with Virgin Media O2, Hubbub established the Tech Lending Community Fund, which has provided laptops and data to charities who work with vulnerable groups, including survivors of domestic abuse, refugees, asylum seekers, and those at risk of homelessness. This can enable people to connect with critical services that they would otherwise struggle to access - for example medical appointments, or job applications.

Through its partnership with Virgin Media O2, Hubbub has also been able to repurpose thousands of laptops that were no longer being used and donate them to charities. Reusing or repairing existing items rather than buying or producing new can also have a positive impact on sustainability in our physical environment.

CAST

The Centre for Acceleration of Social Technology (CAST) is a charity that works with non-profit organisations to help them better understand how to develop online services, and how to embed digital approaches into their strategy and governance. CAST runs a number of programmes each year, including:

- Coffee Connections – a networking event showcasing best practice digital solutions from organisations in the voluntary sector
- Design Hops – a free course where charities can learn step-by-step methods for designing online services.

Find out more about Design Hops and CAST's other programmes and activities.

Digital software

A number of organisations provide free or discounted software to charities and voluntary organisations (which can also help support their financial sustainability).

- Benchmark provides a number of free software packages for charities, including accounts and payroll, and customer relationship management. Demos of each of these pieces of software can be downloaded directly from the Benchmark website.
- The Document Foundation, created by a group of free software advocates, provides LibreOffice (commonly known as OpenOffice) a package of software offering word processing, spreadsheets, slideshows and other resources.
- Charity Digital has helped more than 38,000 charities to save money on software. Charity Digital partners with leading software providers to source free or discounted software, such as accounting, payroll and antivirus software.
- As charities increasingly rely on their digital channels, cyber security is also of critical importance. The National Cyber Security Centre offers cyber security guides, training tools and other resources tailored to small charities.

Donate:code

Many voluntary organisations, particularly smaller charities, struggle to afford full-time digital communications professionals.
Donate:code is a platform through which software developers, graphic designers and other digital specialists donate their time to charities in need. Charities can sign up and post their project, which could include the creation or redesign of a website or app, and specialists on the platform can then view the projects and volunteer their skills.

Integrate UK

Integrate UK is a Bristol-based charity that aims to empower young people to transform society. The charity was aware of the challenge of digital inclusivity when it transitioned from an organisation offering workshops and other communications entirely in-person to an online operation. Some of the young people the charity works with do not have access to the internet or computer equipment. Integrate UK secured 17 digital kits to help ensure those young people could engage with its online services, which include weekly pastoral calls, online tutoring and creative workshops.

Creating a brighter future

The sustainability themes covered in this guide have been chosen because of their relevance to all voluntary organisations, regardless of their size or the nature of their services.

Alix Bedford says: “This guide brings together some of the knowledge and learnings we’ve gathered from speaking to our customers, including best practice examples, in order to support organisations on their journey towards becoming more sustainable.”

This reflects Zurich’s purpose - create a brighter future together - and our desire to partner with others to drive transformative change, so we can all thrive today and in the future.

Further information

- The Sustainability Shift: People
- The Sustainabililty Shift: Places
- Climate impact on UK food
- Protecting our ocean and connecting people

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