

November 2004

being investor ready

An initiative of the **Statewide Landcare Team Victoria**

This Handbook has been compiled with support and advice from the West Gippsland, Corangamite and Port Phillip & Westernport Catchment Management Authorities and investment by the Victorian Action Plan for Second Generation Landcare.



Port Phillip and Westernport



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background to 'being investor ready'

Landcare communities in the Corangamite, West Gippsland and Port Phillip & Westernport Catchment Management Authority regions have identified and expressed the need for skill development and process knowledge to assist them in obtaining financial and other support from non-traditional investors. They have requested an opportunity to be trained and skilled in the techniques and methods of successfully engaging with potential partners and investors.

'Being Investor Ready' Goal

The overall goal for the Being Investor Ready Project was to:

'Enable greater self-determination and resilience in the Landcare community.'

'Being Investor Ready' Purpose

The purpose of the 'Being Investor Ready' project was to:

'Help build the capacity of the natural resource management community across three CMA regions.'

The implementation of the Victorian Action Plan for Second Generation Landcare has supported various pilot projects across the State. 'Being Investor Ready' is one such project and it aims to share knowledge and learning across the State. Initially a series of workshops were held across three CMA regions to develop and refine the 'Being Investor Ready Toolkit'. The aim of this toolkit is to help groups to build corporate, philanthropic and other partnerships that increase investment in achieving natural resource management goals.

The Victorian Landcare movement was the first significant community based Natural Resource Management (NRM) network in Australia to initially be supported by the Victorian Government. This community group movement began with a single focus of action by volunteer community

groups. Soon the tasks evolved to tackle more complex issues with the need to plan more strategically, have multiple leaders, seek multiple partners and diversify their sources of technical and financial support.

Public Funding

Publicly funded programs such as the Natural Heritage Trust, National Action Plan for Salinity and Water Quality, National Landcare Program and Victorian 2nd Generation Landcare have been major funders of community Landcare in Victoria. Recently, Victoria's ten Catchment Management Authorities (CMAs) have become important partners for the development of local and regional community group strategies and plans. CMAs also have the capacity to direct funds from local, regional, state and national sources to regional priority projects and to form partnerships with community groups to achieve NRM outcomes at the local and regional level. Total dependence on Government funding could be perceived as a risk to the independence of community based natural resource management.

Corporate and private funding

With increasing competition for public funds, corporate and philanthropic sources have become more important. Companies such as Alcoa World Alumina, BHP, Rio Tinto, Edison Mission Energy, Telstra and many others have been supporting landcare activities since the

Decade of Landcare began in 1990. Both community groups and sponsors have learned much from these experiences.

Local government

In the longer term local government may well be the greatest supporter of local NRM groups in helping them achieve landcare outcomes. Local government will also need the skills and tools to build partnerships with outside funding sources to support local NRM activities and outcomes within their region.

Social Assets (Community capacity)

The capacity of communities to achieve change in natural resource condition is reflected in their organisational development, networking between groups and individuals, ability to build partnerships, skill building and knowledge sharing as well as having access to information and technical support.

Strengthening community capacity enables better partnership building by the community with corporate and government organisations. This, in turn, leads to greater access to, and engagement of the community by outside parties with consequent lower risks for community and corporate/government ventures.

This is a major reason government and corporations support sponsorship and partnerships with investment in social assets improvement. Increasing skills and knowledge of individuals and building the capacity of communities through supporting organisational development, networking, partnerships, sharing knowledge and improving access to information are the ways a community improves its chances of achieving its goals and targets for its grandchildren.

Partnerships

On a world scale there have been 400,000 natural resource management group partnerships formed in the last decade involving at least eight million people. (Dr Peter Oliver, Griffith University, RRRO3 Symposium 2003)

Historically community resources often matched government and corporate investment three to

in terms of cash and in-kind support. Both the corporate and community sectors have gained much experience Australia-wide in building landcare products for sponsorship and developing ongoing relationships that work for both parties.

The need for evaluation, promotion, sharing of knowledge gained from field works and to reward both the 'doers' and 'funders' appropriately has been recognised. Government or technically expert public sector agencies have invariably been the third partner and their contribution has been essential and gone largely unrecognised in building trust between all partners about the credibility and relevance (to some bigger picture) of the projects and plans proposed

There are many things that can be offered in a partnership: money, expertise, infrastructure, volunteer labour, matching funds, access to other partners and 'in kind' contributions. Successful partnerships, both long and short term are based on strategic and well thought out jointly 'owned' or 'agreed' plans.

"Partners share the power present in the relationship to achieve goals that are desired by, or beneficial to, the relationship. Not giving someone money – that's sponsorship."

Dr Peter Oliver, Griffith University,
RRRO3 Symposium 2003

The 'Being Investor Ready' workshops and toolkit will help communities learn from others experiences in building partnerships. It will also help build confidence in their preparedness to engage new partners. Partnerships can be innovative, creative, support lateral thinking by communities and corporations and they can be fun. This Handbook is designed to help you develop the most effective and suitable partnership(s) for your group.

Signed

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introduction to 'being investor ready'

Community groups seek partnerships with providers of technical and financial support. Partnerships can operate at any level of formality and complexity, from the formal (NHT) to a handshake (the original 'Alcoa Landcare Program'). To quote Samuel Jackson, "**Marriage (partnership) has many pains but celibacy has no pleasures**" and Landcare Groups can identify with this: **Partnerships take effort but being without partners greatly reduces achievements.**

Landcare Groups are often water catchment based and catchments are integrated systems of people, industry and the natural environment. This is a challenge for Landcare because Landcare group boundaries are not tidy neat entities that match government structures.

In the beginning, Government support for Landcare was based on:

- Government paternalism (top down);
- Fragmented responsibility (separate agencies);
- Specialisation in plans and strategies;
- Reductionist and problem solving in science approaches and;
- Economic versus environmental and social.

In the future support for Landcare may be based on:

- Community, government and corporate partnerships;
- Integrated programs and funding across natural resources sectors (across asset classes);
- Multi and inter-disciplinary in program development actions;
- Systems views of actions to be undertaken (like a landholder has to take); and
- Must be able to demonstrate that it includes economic, environmental and social outcomes.

Partnerships

Community, corporate and government partnerships are the way of the future and not only in NRM and Landcare.

The 'Being Investor Ready' project seeks to understand the essential elements of a partnership:

- A shared vision, developed together (at some level);
- Some common outcome (desired and/or real);
- Sharing knowledge and experiences about the past, present and future (your grandchildren);
- Ongoing commitment – recognizing the long term nature of NRM activities;
- Ongoing facilitation and technical support from some partner/party;
- Agreed predictable responsibilities, accountabilities and communication activities;
- Participatory decision making processes; and
- Celebrating successes.

Types of corporate/business partnerships

There are three broad types of relationship commonly seen in company/landcare group partnerships. They are:

- Sponsor Partnerships (Alcoa World Alumina, Rio Tinto etc) in a philanthropic or core 'business' related way;
- Cause related marketing (Banrock Station Wines, Body Shop etc);
- Public relations. (Commonwealth Bank, Telstra).

Often a mixture of these relationships exist and they all involve public relations.

Business motivation for partnerships with community groups includes:

- Long term business sustainability;
- Links to their core business;
- Risk management (to new and existing development);
- Establishment of a credible track record in environmental activities eg; greenhouse;
- Early compliance with regulatory standards; or
- Inclusion in ethical investment funds;
- Employee morale and engagement.

Businesses that support community group activities are likely to be recognised as employers of choice by prospective employees. Community partners offer the business employee training opportunities, a way to improve staff morale and commitment through engagement in **worthwhile** community activities, especially if this links employees directly with community people working for community outcomes.

Businesses may also increase their brand recognition and improve ties with customers, suppliers, government agencies and the local community. They may also have increased media opportunities and improved access to local markets.

Types of Philanthropic Partnerships

Trusts and Foundations disburse significant amounts of funds to a range of causes and projects annually. Each organisation will have a range of themes or issues that they will support. Various types of Trusts and Foundations exist in Australia. These are:

- Private foundations
- Family foundations
- Community foundation
- Corporate foundations
- Government initiated foundations
- Trustee Companies

KNOW YOUR OWN CASE.

Most philanthropic foundations require the applicant to have Deductible Gift Recipient (DGR) status, which means your organisation or group, must be registered with The Australian Tax Office. Be clear about what you are asking for and why it is important. Set out how you are going to achieve your aims and demonstrate your capacity to deliver. Set out clearly the benefits of your project and think about how you can deliver a positive message for your funder. A philanthropic foundation may be looking to promote their contribution and organisation.

RESEARCH YOUR SOURCES.

Philanthropic foundations generally give to specific causes or issues, so do your homework first. Find out all you can about them, call and talk to their staff about their aims and your project. This will enable you to both see if your project is applicable, will help you refine your application and gives you the opportunity to 'sell' your project. Talking to staff will also enable you to find out how they like the submission to be presented. A good source of information is The Australian Directory of Philanthropy 2004-2005, which contains listings and details for over 360 philanthropic organisations.

IF SUCCESSFUL

Remember that their funding support is a partnership; don't neglect your supporting foundation, keep them informed of your progress, make sure they are recognised in any publicity. The attention you give will be appreciated and may pay further dividends for the future. Remember that you will be presenting a professional approach, even if you are a small Landcare group, and that that takes both thought and work.

getting started

A 'partnership can be 'momentary' and only occur once, or be ongoing with sustained involvement by both partners. Successful partnerships are based on honesty and transparency.

Before progressing a potential partnership for a project you need to determine:

A. What are the 'products and services' that you have to offer or interest a Partner?
What have you got to sell?

There is a need to be clear about:

- Who you are and how you are organized;
- What you do now;
- What you want to do – vision, mission, projects and what form this is in;
- Who is engaged with you now;
- What are you willing to undertake or partner;
- What is the risk associated with setting up any partnership;
- What are the costs and benefits of the partnership;
- What products may be of interest eg; Access to land, land degradation projects, etc

B. What is the 'market opportunity' for your goods and services? Who will want to work with you?

Before approaching a partner you need to:

- Identify your current partners;
- Conduct a search phase on likely partners relevant to your products or services;
- Identify any possible conflicts because of existing relationships?;
- Determine size of activity you are willing to work with and a start point;

- Identify the type of partner your group needs (sponsor, cause marketer, one off public relations donation); and
- Look at strengths and weaknesses of potential partners.

C. What preparation is needed to begin negotiating a partnership?

Before beginning an approach you need to:

- Develop a strategy for engagement of a partner;
- Decide on who your responsible person is for partnership building;
- Acknowledge that partnerships need to grow but have exit clauses;
- Acknowledgement that developing and servicing partnerships has a financial cost, and that a budget is need for this;
- Allocate resources to negotiate, secure and maintain a partnership; and
- Establish a relationship by communicating face to face with potential partners.

D. How do you work together with your partner?

Managing the partnership will take time and resources.

- What form of agreement do the partners need, simple, written or something of a higher order?
- What are the terms of the agreement?
- What are the conditions of sponsorship or support?
- How will you celebrate the success of the partnership?
- How will you promote the partnership?
- How will the benefits of the partnership be shared?
- Set clear objectives and outcomes to avoid disappointment created through false expectations.
- Ensure partnership/project budgets will support these outcomes.

Be certain that you can deliver what you propose!

Be clear and honest about:

- what your group can do for the partner/sponsor;
- the authority of the person negotiating to commit the group to a partnership and program of works;
- the negotiating person being a community member;
- the support and commitment of the group members.

Have risk management in place.

Review progress and involve the partners in the review process.

case study one

woody yaloak catchment project

<i>Location:</i>	Victoria
<i>Issue:</i>	Capacity Building
<i>Community:</i>	Woody Yaloak Catchment Group
<i>Partner:</i>	Alcoa World Alumina Australia, Corangamite CMA, Golden Plains Shire

Project Description: The Woody Yaloak Catchment Project Committee developed a low cost, user-friendly Geographical Information System (GIS) package - 'Streets Ahead' and an associated training module. This enabled the group to more easily plan, and objectively measure progress towards, resource management strategies and goals. (Both their own as well as the Regional and State agencies goals). – THE PRODUCT.

The Partners:

With support from Alcoa, Corangamite CMA, Local Government (Golden Plains Shire), Department of Natural Resources and Environment, Osprey Computing, Ballarat University and other partners, they developed a method of applying GIS technology to help farmers plan and record landscape and management changes.

Background:

The Woody Yaloak catchment area is large and natural resource management needs are diverse. The GIS project aimed to:

- Help land managers access and use spatial data sets to plan actions within paddocks and farms, including regional priorities;
- Help the management committee integrate and coordinate its natural resource management and community development strategies, prioritise activities and review programs at neighbourhood, landcare group and regional catchment scales (CMA and Government Agencies);

- Provide a way to collect annual project site information by category (weeds, salinity, habitat patches information etc) to be accessed by land managers, neighbourhood groups, landcare groups, regional groups and sponsors; and
- Share information within and outside the catchment group.

The project's success has been in developing simple GIS technology, using existing data sets, and applying it at a scale that is immediately usable by land managers and landcare groups, and which builds on the existing knowledge base of land managers and institutions.

The group's application of the GIS method allows land managers to plan at paddock level using existing spatial data. Coordinators can see these plans aggregated to catchment scale and can import spatial and point data sets and export summary data sets to partners.

The system supports the aggregation of project works details and monitoring reports to allow the whole group to summarise achievements objectively. The point data system can handle before and after photographs, and information collected in the project allows the project results to be easily shared throughout the region.

The outcomes for the partners were:

- Alcoa World Alumina Australia – a partnership that had profile, credibility amongst government agencies, genuine outcomes in landcare, recognition that the company was serious in helping develop techniques to change natural assets and support sustainable activities and a public relationship position that increased the acceptance of Alcoa’s role in the regional community for long term business growth.
- Corangamite CMA – a partnership that delivered an innovative way (that can be replicated) of measuring in an aggregated way the efforts of land managers to support works for natural resource condition improvements.
- Golden Plains Shire – a partnership that achieved a way of measuring activities and eventually resource condition changes across private lands.

Sponsor Testimonial:

The Alcoa Landcare Project has become one of Australia's largest and most successful demonstrations of cooperative community action.

Through our partnership with Landcare, Alcoa has helped bring about education and social change, the accelerated repair of degraded land, the conservation of biodiversity, and the restoration and protection of waterways.

**Wayne Osborne,
Managing Director,
Alcoa World Alumina Australia**

From:

www.landcareaustralia.com.au/ProjectDisplay.asp?ProjectID=28

THANKS TO JODIE GAGER, BASS COAST LANDCARE COORDINATOR FOR PRESENTING THIS CASE STUDY AT THE BEING INVESTOR READY WORKSHOP AT MANNINGHAM

case study two the powlett project

Enhancing, restoring and protecting the natural resource base of the **Powlett Catchment** through community action.

<i>Location:</i>	Victoria
<i>Issue:</i>	Restoration of Vegetation
<i>Community:</i>	Bass Coast Landcare Group
<i>Sponsors:</i>	Edison Mission Energy, Bass Coast Shire Council, South Gippsland Water, Westernport Water, Greening Australia, AXA & West Gippsland Catchment Management Authority

Background: The Powlett Catchment is located approximately 120 km southeast of Melbourne. It has a number of areas of environmental significance, including habitat for both the Giant Gippsland Earthworm and Orange Bellied Parrot. With less than 5% remnant vegetation within the catchment, protection and enhancement of this base is very important. Sixteen Ecological Vegetation Classes exist within the catchment, ranging in bioregional status from threatened to endangered. The natural resource base of the region is exceptional and this, coupled with reliable rainfall, makes it home to one of the most productive farming regions in Australia. The region is also a major tourist destination. Many visitors come to experience the dramatic coast and rolling hills.

Project Description:

The Powlett Project is a community driven program that has been developed by the land managers in the Powlett catchment to address major land, waterway and coastal degradation problems. Through community action, the Powlett catchment is undergoing a dramatic transformation. Representatives from the local community, State Government, Landcare Australia, Tree Project, Conservation Volunteers Australia and local municipalities, initiated the Powlett Project in 1995. In the first five years it attracted funds from about 30 sources, including NHT, Bass Coast Shire, BHP, Telstra and South Gippsland Water. Community tree planting events, field days and on-farm best practice continue to be the foci of the project.

Catchment Issues:

Despite its exceptional natural resource base, much of the catchment is under threat. Over-clearing and unsustainable farming practices have led to soil loss through tunnel and stream bank erosion. Landslips and soil creep (slow moving landslips) are also problems. Loss of habitat for native animals in the farming and coastal regions has led to decreased biodiversity. Increasing nutrient levels in the Powlett River and its tributaries are a major concern. The area also suffers major weed infestations that threaten pastures, wildlife habitat and waterways.

Action in the Powlett:

In order to arrest local issues the community has banded together to tackle the problems at a catchment level. A number of Landcare and Coast Action projects have already taken effect. These include:

- Riparian planting throughout the catchment
- Wetland protection and re-establishment
- Sand dune stabilisation
- Tunnel erosion and landslip control
- Corridors and shelterbelt establishment utilising direct seeding
- Protection of existing strands of remnant vegetation
- Weed eradication
- Support of local Landcare groups

Since the project began in 1996, over 800,000 indigenous trees and shrubs have been established involving in excess of 580 volunteers. This has required 2,200 km of fencing, most of which has been supplied at the land manager's expense. The results of these activities have seen 450 hectares of degraded land retired from agricultural use and transformed into wildlife habitat.

The Partners:

The Powlett Project brings together private land manager's, state and Australian governments, West Gippsland Catchment Management Authority, Bass Coast Shire Council, Edison Mission Energy, South Gippsland Water Authority, DPI, Greening Australia, Water Watch, AXA, Landcare Australia and the Landcare community investing resources for enhancing, restoring and protecting the natural resource base of the Powlett Catchment through community action.

Getting involved:

The Powlett Project has Landcare activities throughout the year and urges volunteers to get involved. The major tree planting effort is undertaken later in the year to take advantage of the best seasonal conditions.

To get involved, please call:

- Jodie Gager, Bass Landcare Coordinator, 03 5678 2335.
- Geoff Trease, Powlett project Officer, 03 5671 2427.
- Rob Youl, Landcare Australia, 03 9662 9977.

THANKS TO LESLEY BROWN OF THE MT ELEPHANT COMMITTEE OF MANAGEMENT FOR PRESENTING THIS CASE STUDY AT THE BEING INVESTOR READY WORKSHOP AT WARRAMBEEN LANDCARE EDUCATION CENTRE

case study three mt elephant

<i>Location:</i>	Victoria
<i>Issue:</i>	Buying a Mountain
<i>Community:</i>	Mt Elephant Committee of Management
<i>Partner:</i>	Trust for Nature, Alcoa World Alumina Australia, Corangamite Shire, Corangamite CMA

The opportunity: Mount Elephant is a steep sided volcanic scoria cone. It is one of the highest volcanoes in Victoria rising 240 metres above the surrounding plain. It is a site of National significance and listed on the Register of the National Estate. Known as the Swagman's Lighthouse, a landmark for all to navigate their way throughout the Western district, Mount Elephant had been privately owned since European settlement. Heavily grazed, ravaged by bush fires in 1944 and 1977, and invaded by Patterson's Curse, thistles and rabbits, the Mount has always been loved by all for its dominance of the landscape. The then owners the Eldridge family decided to offer the Mount for sale by auction in December 2000 as part of a consolidation and change of direction process.

Community Ownership:

The communities of Derrinalum and Lismore rallied at the opportunity. A public meeting was held to gauge support of the possibility of buying the Mount for community ownership. Representatives of the local communities held discussions with Trust for Nature with a view of forming a partnership with them. At this community meeting there was overwhelming support that we should try to buy the Mount, many people were very passionate and emotional about their attachment to the Mount. With this demonstration of support Trust for Nature offered their support toward funding the purchase. This was our first funding partnership.

Project Description:

Aims

- To protect the heritage and environmental values of Mount Elephant.
- To develop and implement a Management Plan; and
- To develop and maintain the partnership with Trust for Nature and wider community and all groups with shared aims.

Priorities

- Establishing basic facilities
- Consolidating and improving access to the site
- Commencing a marketing program
- Controlling pest plants and animals
- Commencing quarry stabilisation and rehabilitation
- Ensuring public safety and
- Commencing vegetation restoration.

Partnerships:

- Corangamite Shire funded the access road and car park.
- Adjoining landholder Jamie Maconachie leased the land for the road.
- CCMA and Alcoa Landcare Program identified needs and assisted with funding our management plan.
- NHT Envirofund – revegetation and weed vermin control
- Borbidge Fund – Jack Borbidge legacy

Steep learning curves

- Filling out applications forms and obtaining the funds
- Calling for tenders, working with consultants and commissioning works.
- Listening to everyone's opinions and ideas.

Keystones to success

- Always complete a project to the highest standard.
- It's difficult to respond to offers/opportunities when a project moves quickly.
- Having a dedicated Committee of Management with diverse skills.
- Success brings benefits to the broad community. Eg tourism, and funding for a rural transaction centre in Derrinallum.
- Volunteer Workers drawn from many community organisations.
- Always make sure volunteers are thanked, and appreciated.
- Hold regular open days.
- Identify opportunities i.e. philanthropic groups; their role and how to access them.
- A management Plan gives a guide and direction for the future.
- Interpretive Signage acknowledges funding from partners.

Unexpected outcomes

- The project has been full of surprises – highs and lows.
- Lots of funding, but also lots of rejection.
- Remember to address the criteria of the application.
- Remember to attend to the detail of budgets.
- Being overwhelmed with the support and excitement.

What we learned

- It has been very time consuming completing application forms and obtaining necessary support letters. We have a passion to develop the Mount and this with the support we receive carries us through.
- Negativity from a minority who have said we will never do it, never plant trees, never control rabbits, it is just a mound of scoria, why bother!! But we are well on the way to do these things.

Future challenges

- To continue to obtain funding before the novelty wears off.
- Sustain our level of enthusiasm, and work through bureaucracy to achieve our aims.

building partnerships

The goal of a partnership agreement for your group might be to utilise an existing relationship with another body (State/Australian government agencies, local government authorities, industry and corporate groups, academic groups, non government organisations and other NRM groups) to build co-operative partnerships that will assist your group in undertaking its current and future activities to achieve your vision and objectives.

Likely partners will have voluntary, statutory, business, industry, social and/or philanthropic interests in your region. Any arrangements for co-operation need to be built on the strengths, skills, talents and resource base of the partners. Agreements should focus on the area of interest of each partner.

Agreements (in whatever form) need to clearly define the roles and responsibilities of the partners as well as sharing success, the commercial or

philanthropic success. The primary objective of any agreement is to increase the efficiency and effectiveness of natural resource management actions (in the public interest) taken by the groups land managers in specifically identified areas. Partners can achieve this though ensuring a participatory planning approach to relevant policy development, strategic and operational planning, effective communication and each partner's monitoring and evaluation needs.

Who are likely partners for your Group?

Government:	Australian government agencies: Department of Agriculture, Fisheries and Forestry, Department of Environment and Heritage Victorian government agencies: Parks Victoria, Department of Primary Industries, Department of Sustainability and Environment State government statutory bodies: e.g. Catchment Management Authorities Local government and Municipal Association of Victoria
Non Government Agencies:	Greening Australia WWF Trust for Nature
Industry Groups:	Agricultural Research and Development Corporations Mining groups Agricultural businesses Financial and insurance institutions Companies that have greenhouse emissions or need carbon credits Companies that have a related cause marketing issue Corporations operating at National, State, Regional or district scale Tattersalls
Academia:	Universities NRM groups

types of partnership agreements

Partnership arrangements describing activities and actions to be carried out can be formal (written) or informal. Any 'agreement' implies participation, negotiation and agreement by all parties to the 'business' **that is the subject of the agreement**. There also needs to be consideration as to the partners' capacity to 'affect' the activities described in the agreement.

Memorandum of Understanding (MOU)

MOU's are written formal documents that are general in scope and contain broader co-operative statements about process for consultation and negotiation. MOU's generally do not produce measurable outcomes but are useful to ensure your organisation 'gets a seat at the table' in policy and planning developments.

Partnership Agreements:

Generally these are more formal written documents that clearly define specific programs and goals, activities and responsibilities of each partner.

Partnership agreements are often written to produce measurable outcomes (process and results) relating to program objectives and planning needs.

Process for Developing a Partnership Agreement

Specific steps are required to develop agreements between partners.

- Firstly** establish the policies of the partnership;
- Clearly** identify activity areas for the partnership;
- Finally** formalise a partnership agreement & an agreed process to establish;
 - Goals/objectives (performance and outcome);
 - Program areas identified to be supported;
 - Legal and technical responsibilities;
 - Responsibilities for agreement;
 - Monitoring;
 - Review (performance) of the agreement
 - Sharing of knowledge gained
 - Accountability
 - Communication;
 - Celebrating success.

See:

The Prime Minister's Community Business Partnership website Fact Sheets

www.partnership.zip.com.au/media/partnerships%20Features.pdf

Appendix 2 for a Sample Local Agreement format

Appendix 3 for a Sample Regional Agreement format

Some partnerships do not work out because of insufficient planning, unequal contributions, partners not sharing the same values and/or unrealistic expectations. Avoid disappointment, wasted time and misplaced resources by: **'Being Investor Ready'**.

The Four Stages of Building a Partnership



checklist 1

community group preparedness

Ask your group these questions

Yes / No

People

1. Do you have a person responsible for partnership building coordination and negotiation? Do they have the right skills?
NOTE: A COMMUNITY PERSON SHOULD REPRESENT THE GROUP.
2. Have you listed and prepared some referees?
NOTE: A REFEREE WILL VOUCH FOR YOUR GROUP'S ABILITY TO PLAN AND DELIVER.

Plans

3. Has your group a vision, strategy, plan or articulated objectives. Does it relate to plan or strategy held at regional or state level?
NOTE: A GROUP'S PLAN CAN BE SIMPLE BUT NEEDS TO RELATE A REGIONAL CATCHMENT STRATEGY FOR EXAMPLE.

Promotional Material

4. Do you have some materials prepared for showing what your group has done, can do and is planning to do?
E.g. photographs, previous project reports

Process + Project Management

5. Does your group have an organisational structure; is it incorporated under the companies act? does it elect representatives for office bearers? does it report on resources and activities?
NOTE: SMALL GROUPS CAN USE LANDCARE NETWORKS/ LOCAL GOVT./CMA AS 'UMBRELLA' STRUCTURES
6. Can you demonstrate your group's participatory decision-making processes for developing programs and prioritising investment?
NOTE: HOW DO YOU DECIDE PRIORITIES FOR ACTIVITIES?
7. Does your group have a process for thinking about ethics and values?
NOTE: ARE THERE PARTNERS YOU WOULDN'T WORK WITH, HOW WOULD YOU DECIDE THIS?
8. Does your group have independent and professional standards of advice for project design, implementation and legal and tax compliance?
NOTE: AN ACCEPTED STANDARD OF PROFESSIONAL/TECHNICAL ADVICE MAY NEED TO BE DEMONSTRATED FOR PLANS/WORKS/STRUCTURES – A GOVERNMENT AGENCY OFFICER.
9. How will the group ensure maintenance of the projects?
10. What will your risk management strategy be?
NOTE: SOME CHANGES WILL BE BEYOND YOUR CONTROL HOW WILL YOU CATER FOR THINGS THAT GO WRONG? THE PARTNERSHIP AGREEMENT NEEDS TO REFLECT THIS.
11. Does your group have liability and indemnity insurance?

Partnership Management

12. Have you considered the form of the partnership agreement?
13. How will you involve the partner(s) in the decision-making and review and prioritisation processes?
14. Have you considered how the community group will acknowledge and celebrate the partnership progress and successes?

checklist 2

what does your group have to sell?

Your group's products & services

1. What does your group need eg;

- Financial support;
- In kind support (e.g. fencing wire);
- Technical expertise;
- People skills and muscles;
- Relationships to be built for access to long term partners;
- Agreements to deliver education programs or site access; or Influence?

2. Identify the project, program, product or service your group may have to market.

This may include such things as:

- Access to your members for training or educational site development
- Access to land, water or biodiversity for learning or carrying out activities (tree planting or monitoring) for company staff;
- Projects that deliver riparian or remnant vegetation or water quality outcome etc i.e. public good outcomes;
- Community capacity building projects (for your members) with training or visits or infrastructure e.g. computer programs; or
- Joint program delivery for pest plants or animals, water quality, land monitoring or neighbourhood monitoring projects.

3. Your potential product could be:

- Relationship orientated, i.e. selling your reputation or community access;
- Technically orientated, i.e. needing technical advice and support or infrastructure;
- Financial; or
- Communication orientated i.e access to journalistic expertise and media space.

4. Identify some social, economic and environmental benefits of your product/project/group and be able to show how they fit with regional and state priorities e.g. Regional Catchment Strategy, Local Government plan

5. What can you learn from other landcare groups and networks about their partnership activities?

NOTE: WHAT PRODUCTS AND SERVICES HAVE OTHER GROUPS BEEN SUCCESSFUL WITH?

6. Do you need to conduct a preliminary investigation or feasibility study for a project?

NOTE: BE PREPARED TO TEST A PRODUCT ON A SMALL SCALE WITH A PARTNER.

checklist 3 part A

identifying the market opportunity

Ask your group these questions or note these comments

Yes / No

1. Do you have current partnerships? Can your current partners do more or do you need to find others?
2. What scale of corporate partner is needed – local, regional, state or national or international?
3. Ask corporations/community groups who you know have formed partnerships for advice on their experiences.
4. Search for partners by category: government, local government, corporate, Non Government Organization etc; Target different sorts of organizations.
5. Develop shortlists of likely partners and discuss them in your group.
6. Attempt to research what these potential partners may be interested in partnering, ask potential partners for help to do this;
NOTE: RESEARCH THE POTENTIAL PARTNER'S BACKGROUND; HAVE THEY BEEN INVOLVED WITH OTHER COMMUNITY GROUPS?
7. Look for some synergy of interests between your group and the potential partner.
8. Examine the ethics and values of the targeted partners.
E.G. CHECK PARTNERS WEBSITE FOR ORGANIZATIONAL PURPOSE AND VALUES. WHAT ELSE DOES THE COMPANY DO TO OFFSET ITS ENVIRONMENTAL IMPACTS?
9. Get to the right person in the company or partner targeted.
NOTE: SOMETIMES THIS MIGHT BE THE CHAIRMAN OF THE BOARD, THE CEO, THE PUBLIC RELATIONS MANAGER OR THE SITE OPERATIONAL MANAGER
10. List the group's benefits and costs of any likely partnership
11. Involve potential partners in the preliminary discussions on building likely projects for support
NOTE: THEY MAY NOT WANT WHAT YOU THINK YOU HAVE TO OFFER BUT MAY RECOGNIZE OTHER BENEFITS IN THE PARTNERSHIP – GIVE THE PARTNERSHIP TIME TO BE NEGOTIATED
12. Identify in a very preliminary way the taxation position for the business and the group if financial contributions are sought
NOTE: POTENTIAL PARTNERS WILL HAVE A CLEAR UNDERSTANDING OF THEIR TAX POSITION.
13. Be prepared to take 'no' kindly and maintain the relationship for next time
NOTE: INVITE THEM TO RELEVANT GROUP EVENTS AND KEEP THEM INFORMED.

checklist 3 part B

assessing benefits for the Potential Partner

'Partnerships are a way for business and community sectors to share what they do best and increase performance and efficiency levels between both.'

1. Improve access to new markets

NOTE: LINKING A PRODUCT TO A WORTHWHILE CAUSE E.G. LANDCARE

2. Opportunities for the partner's staff skills development

NOTE: GREATER RESOURCEFULNESS, TESTING LEADERSHIP SKILLS, WORKING WITH COMMUNITIES

3. Increasing partner's staff morale and motivation

NOTE: ENABLING THE PARTNER TO DEMONSTRATE WORTHWHILE COMMUNITY VALUES TO IT'S STAFF AND CUSTOMERS

4. Attracting and retaining quality staff (employer of choice)

NOTE: THE POTENTIAL PARTNER'S REPUTATION IS ENHANCED THROUGH IT'S IMPROVED COMMUNITY RELATIONS.

5. Increased brand recognition and trust

NOTE: LINKING THE PRODUCT TO A WORTHWHILE CAUSE.

6. Product and Service Trialing and Development

Note: The community group can offer to test products.

7. Inclusion in Ethical Investment Funds

NOTE: POTENTIAL PARTNERS CAN CLAIM TO BE ETHICAL IN THEIR SOCIAL AND ENVIRONMENTAL AIMS.

8. Public policy influence

NOTE: POTENTIAL PARTNERS MAY BE ABLE TO LEVER THEIR COMMUNITY PARTNERSHIP ARRANGEMENT TO HAVE INFLUENCE ON NATURAL RESOURCE MANAGEMENT POLICY DEVELOPMENT.

9. Non Government Organisation (NGO) access

NOTE: COMMUNITY GROUPS HAVE RELATIONSHIPS WITH NGOS THAT POTENTIAL PARTNERS MAY LIKE TO ACCESS (ON NEUTRAL TERRITORY).

checklist 4 part A

how do you work together with your partner?

Partnerships come in all shapes and sizes however they all share these principles to ensure potential benefits, costs and risks of the partnership are clear.

Have you thought about the following principles?

Yes / No

- | | | |
|--|-----------------------|-----------------------|
| 1. Do you have a clear group purpose/goal for engaging a partner? | <input type="radio"/> | <input type="radio"/> |
| 2. Has your group learnt about whom you are engaging with and their view of you and the issue (values)? | <input type="radio"/> | <input type="radio"/> |
| 3. Has your group developed a meaningful and predictable relationship?
<small>NOTE: SEE CHECKLIST 4 – PART 2 FOR PARTNERSHIP AGREEMENT ELEMENT</small> | <input type="radio"/> | <input type="radio"/> |
| 4. Will the partnership provide genuine and broadly equitable benefits and costs for each partner? | <input type="radio"/> | <input type="radio"/> |
| 5. Is there genuine and realistic commitment from each partner?
<small>NOTE: HAS THE COMMUNITY GROUP DEVELOPED A PROCESS TO ACHIEVE UNANIMITY OF COMMITMENT AND DOES THE COMMUNITY GROUP REPRESENTATIVE HAVE THE APPROPRIATE LEGITIMACY TO REPRESENT THE GROUP?</small> | <input type="radio"/> | <input type="radio"/> |
| 6. Does the business of partners complement one another – is there a natural fit? | <input type="radio"/> | <input type="radio"/> |
| 7. Has your group and the potential partner identified the nature of the relationship; the costs, benefits and risks in any agreement? | <input type="radio"/> | <input type="radio"/> |
| 8. Are ongoing commitments understood by both partners? | <input type="radio"/> | <input type="radio"/> |
| 9. Are the roles and responsibilities of your group (and other partners) clearly defined and understood? | <input type="radio"/> | <input type="radio"/> |
| 10. Are the expectations, works and resources to be committed by your group (and other partners) in the partnership able to be practically achieved?
<small>NOTE: THIS MEANS BOTH PARTNERS UNDERSTAND THEIR OBLIGATIONS AND HAVE REALISTICALLY ASSESSED AND AGREED TO THEM.</small> | <input type="radio"/> | <input type="radio"/> |
| 11. Have you identified in the negotiations to establish the partnership that community groups do change and do have diversity in views/ representatives? | <input type="radio"/> | <input type="radio"/> |
| 12. Will this partnership achieve practical, measurable and relevant change? | <input type="radio"/> | <input type="radio"/> |
| 13. How will you acknowledge and celebrate your partnership? Public relations options to consider: Signage, launches, staff workdays, community work days, media, logos on newsletters, websites | <input type="radio"/> | <input type="radio"/> |

checklist 4 part B

managing the partnership - successful partnerships agreement

Once a partnership approach has been chosen its time for determining the form of the simple agreement to ensure each party has a clear and similar understanding of what the partnership is about.

Sample Agreement template content

Check

A. This Agreement between _____ and _____

- The partnership will (what will the partnership do)
- Why
- By who (and explain their interest)
- When
- Where

B. The Aim and Outcomes of the Partnership are;

- Together we have these aims and outcomes, to
- Partner 1 will
- Partner 2 will

C. The Responsibilities of each partner are;

- Together we will
- Partner 1 will
- Partner 2 will

D. The Resources required (Funding, people and power) to;

- Support the partnership are
- Partner 1 will provide.....
- Partner 2 will provide.....

E. Partnership Management (How does it work)

- Representatives required, Committee process, Cross- organisational involvement arrangements,
- Identifying specific roles to be filled by individuals

F. Review and Monitoring of Progress and Partnership

- How are you going to measure achievements and outputs?
- How will you report to all partners?
- Who is accountable for what, and how often?
- How will you review the partnership and how often?
- How will you celebrate successes achieved?

G. Conclusion and Recommendations

- A concluding statement, including a dispute resolution process,
- When and how does the partnership finish?

further useful information

Taxation

GST

Companies and Non Government Organisations require a tax invoice before they can 'hand over' any money; this is easier if the group is incorporated with an ABN. Some small groups without an ABN use their local shire, or a larger group's ABN. Usually the invoice includes GST as an additional amount that the company claims back.

Company tax

Each company will approach company tax differently and it is important to know the system your sponsor/partner uses. Bigger companies will have programs for community citizenship support. These are part of their marketing structure and are therefore tax-deductible. Some companies will supply funds from a promotional budget or may allocate a percentage of their profits via a philanthropic trust. Landcare Australia Limited is able to convey tax-deductible status for landcare donations. They are open to agreements for companies to pass funds directly to programs or groups.

See: The Prime Minister's Community Business Partnership Fact Sheet on tax
www.partnership.zip.com.au/media/tax_fact_sheet.pdf

Conditions of Sponsorship/Partnership

Each partnership and project will have different arrangements and it is important to work out the conditions with your partner. The points below are a guide to the types of arrangements that have been agreed to in practice by sponsors of 'on ground works'.

The group undertakes that programs or projects supported by the partnership are:

- Technically and legally sound (as advised by a credible source, usually an agency or institution or professional adviser/group);
- Related to some strategic (local or regional) plan agreed to by parties or by the group;
- Inclusive of an agreement to share (with sponsor/partner support) results/knowledge/information/successes with others;
- Monitored and reviewed (photographs, records, field inspections etc);
- Matched by a contribution in kind by the group and individuals involved;
- Cross boundary in some respect i.e. a public outcome not a private gain.

Partnership agreements will differ but it is important to be clear and address all issues in your negotiations.

Once you have reached an agreement with your partner, it is essential to meet the deadlines set out in your agreement, to honour promises made and to involve the partners in celebrations of success. Board Chairman and Chief Executive Officers of companies realise the usefulness of their investment most through meeting and working with people who obviously care about their community and landscape. The most powerful feedback you could give a partner is that the partnership has improved community unity and natural resources outlook.

Landcare Australia Limited

Landcare Australia Limited supports the Landcare and Coastcare movements by raising funds and awareness, and helping government, corporate and community become partners. Landcare Australia offers practical services to groups with no fees or deductions:

- Development of proposals and presentations
- Formal partnership agreements and contracts
- Invoicing, accounting services and market research
- Advice and assistance with logo use
- Event and award design
- Use of the Landcare Australia board, patron and celebrities
- Advice on government relations and ministerial involvement
- Additional financial resources
- Access and introductions to useful links and networks
- Training and workshops

Reporting Successes

During the life of your project it is important to provide all partners with regular updates; usually a single page with photos if possible.

It is also important to share your successes with your partners and involve them in field and community group celebrations.

On completion of the project all partners will expect a simple report in a form that can be promoted. Include any media coverage, letters, photos and a financial acquittal.

See: Appendix 4 for a Sample Sponsorship Success Report

useful information + contacts

To contact a regional landcare coordinator from any of the 10 Victorian Catchment management authority regions go to the Victorian landcare gateway at; www.landcare.net.au

Partnership websites:

www.latrobe.edu.au/csirc

www.partnership.zip.com.au

www.myerfoundation.org.au/main.asp

www.landcareaustralia.com.au/ProjectDisplay.asp

www.bensoc.asn.au/getinvolved/corporates_full.html

www.wafuturefund.riotinto.com/partnerships.asp

www.greenhouse.gov.au/challenge/members/success-stories/edison.html

www.affa.gov.au/content/output.cfm

www.westernpower.com.au/html/about_us/community/partnerships/greenchallenge.html

Government websites:

www.deh.gov.au/programs/index.html

www.communitywise.wa.gov.au

www.partnership.zip.com.au/info_nonprofit.html

www.partnership.zip.com.au/media/partnerships%20Features.pdf

Case Studies:

www.partnership.zip.com.au/casestud.html

www.landcareaustralia.com.au/projectlist.asp

www.wafuturefund.riotinto.com/rio5.asp

Taxation:

www.partnership.zip.com.au/media/tax_fact_sheet.pdf

Brokerage:

www.partnership.zip.com.au/media/BROKERAGE.pdf

www.ourcommunity.com.au/business/business_main.jsp

www.bedfordindustries.com.au/fundraising/corp_partner.htm

Philanthropy:

www.philanthropy.org.au

<http://www.philanthropy.org.au/publications/directory.htm>

'Are you ready?' Quiz:

www.ourcommunity.com.au/business/wizard1_community.jsp

Landcare Australia Limited

Email: inquiries@landcareaustralia.com.au Website: www.landcareaustralia.com.au

appendix 1

comments on partnership building processes by a corporate planner

Continuity

A sponsorship program or project to be funded needs to be closely integrated with existing landcare, bushcare, rivercare efforts being undertaken by a regional or landscape or community landcare group and supported by other partners (Government sector or NGO).

Timing

Projects to be funded are best funded at their beginning while landholder enthusiasm for on-ground work is increasing.

Scale

A good scale of activity is when all key players in the group to be supported can fit in a shearing shed or country hall for afternoon tea.

Corporate partner needs local insight in its decision making

At least one member of the Corporate Partnership/Funding Advisory Panel (for the company) is personally familiar with each project to be considered for funding.

Trust

There should be no overt audit processes. The partner can trust the groups and the groups will trust the partner if the communication and engagement processes are working effectively.

Outcomes

These are to be made clear and simple. There must be no confusion over the aims of the project. One to two A4 pages (including a map) is all that should be required.

Consultative development

At every main step relevant in the process of developing a partnership/funding program, groups and the partner discuss the options and have a shared understanding of the partners/funders strategy.

Sequential development

The partnership/funding program should be under constant review and respond to changes and opportunities (in consultation).

Instant decisions

Decisions required by the corporate or company partner should be quick with very few needing further consideration or negotiation.

Community decisions

Community network/landcare groups decision making process for funding, or prioritisation of activities, need to include all partners in some democratic/participatory decision-making process.

Communication

Constant communication with network/landcare groups in the partnership needs to be maintained in an open and transparent way. The group applying the agreement arrangements rather than asking the corporate or company player to be king should resolve ineligible activities put up for support. The temptation to play king in decision-making on partnership requests should be avoided.

Discretionary opportunities

There should always be scope for some adventure in the relationship and activities supported.

Predictability

Consistent advice and decisions are required to be made with the process and aims of the partners being transparent.

Note: Attach map of project site and works.

appendix 2

sample local agreement

Name of potential corporate/Government/NGO partner:

Name of organisation applying for donation/sponsorship/partnership:

Contact person:

Position held:

Postal address:

Phone number(s):

Fax:

Email:

Australian business number (ABN) of the community group:

Is the community group/organisation incorporated?

How much funding do you seek? (Do not include G.S.T.)

\$

What is the support/sponsorship to be used for?

When is it needed by?

When will the activity finish?

Who will maintain and manage the project?

Positive outcomes for your group:

Positive outcomes for the community/landscape:

Name of strategy or plan that supports this activity as a priority:

Other partners involved:

How will the partners be acknowledged?

Professional fees?

Declarations:

Date:

Signed:

Full Name: (PLEASE PRINT)

appendix 3

sample regional agreement

Statement of Agreement and Cooperation: for protecting and establishing riparian vegetation along Snake Gully

This agreement is between Snake Gully Landcare Group and Santa's Southern Connection

Date / / 2004

Introduction

A brief two paragraph explanation of the purpose of the partnership:

The Snake Gully Landcare Group has long noticed a decline in the vital vegetation that forms the staple diet of Santa's white boomers. The decline of this vegetation association not only means that Santa's white boomers now need to travel further to feed, but the lack of vegetation also has resulted in erosion and silting up of Snake Gully creek.

Through this partnership, the Snake Gully Landcare Group is seeking the funds to enable them to fence off 20 kilometres of the Gully and revegetated either side with a ten metre strip of a mix of native flora, not only creating a healthy mini eco system, but also providing the much needed staple diet for the white boomers.

Santa's Southern Connection

Brief description of the company:

Established in 750AD, the parent company, simply known as 'Santa's' began to establish hubs all over the world, ensuring that each continent could be serviced by the appropriate 'sleigh-pullers' for their region. In 1875, the company moved into Australia and Santa's Southern Connection (SSC) was founded. With the ethic of giving and caring for the environment, SSC has grown and kept pace with the growing demand for its services.

Snake Gully Landcare Group

In 1995, the Snake Gully Landcare Group formed after recognising the need to work together across farm boundaries to better address land degradation issues. Consisting of 19 farming enterprises and covering an area of 25,450 hectares, the group has implemented an impressive range of on-ground works in their catchment (see attachments and letters of support) and have moved from simple cross boundary work to identifying projects which address and add to regional targets.

Statement of agreement to establish partnership
This agreement has arisen from a desire by Santa's Southern Connection and the Snake Gully Landcare Group to work together, (at State, regional and local levels) to manage natural resources in Victoria.

The Partnership

The partnership is a collaborative agreement between above mentioned groups.

The Snake Gully Landcare Group pledges to involve Santa's Southern Connection in activities of the group for the life of the project and share communications and results of the project. The Group will also ensure that SSC is acknowledged in all promotional material related to the project.

appendix 3 sample regional agreement (cont.)

Santa's Southern Connection will provide a staff of twenty elves to assist with fencing the gully as well as half the cost of the materials. Six of SSC's best white boomers will be made available to pull the site preparation machinery. SSC will also provide funding to pay for the hire of machinery suitable to the site.

Area of interest and program activities

Less than 500 words describing the agreement.

Outcomes

The partners seek the following shared outcomes.

- Establish 20 kilometres in length of native vegetation along Snake Gully of the appropriate vegetation type for the area which is also the staple diet of white boomers;
- Establish corridors along the creek at least 10 metres wide to act as a buffer zone to protect the creek from erosion and also to allow movement of white boomers between the adjacent areas of remnant vegetation;
- Promotion of community group in achieving public good outcomes; and
- Safe delivery presents to children because of improved health of the white boomers.

Responsibilities

Santa's Southern Connections and the Snake Gully Landcare Group will work together and with others, to achieve State, Regional and local outcomes.

State level - points

Regional level - points

Local level - points

The Snake Gully Landcare Group agrees to etc

Santa's Southern Connections agrees to etc

Review and Monitoring

This agreement will be evaluated on an annual basis. Subject to agreement that appropriate levels of cooperation have occurred between the Snake Gully Landcare Group and Santa's Southern Connections and ongoing willingness to continue their joint efforts, further development and extension of this partnership will be considered.

Endorsement

This Statement of Agreement and Cooperation serves to reflect the current working relationship of Snake Gully Landcare Group and Santa's Southern Connections. Snake Gully Landcare Group and Santa's Southern Connections recognise the accountability, integration and recognition that will be delivered through the approach described in this Statement and the Snake Gully Landcare Group commits to support Santa's Southern Connections in its efforts to deliver sustainable Natural Resource Management. The intention to implement this Statement of Agreement and Cooperation is endorsed by all parties involved represented by the signatories below.

Santa's Southern Connection representative name and role:

Signature:

Snake Gully Landcare Group, Office bearer name and role:

Signature:

Date: / / 2004

appendix 4

sample success report

Sponsorship Success Report

To enable us to determine partnership success with community group/network and company/agency/local government sponsorship we request that you complete the following form and return it, together with any other information on your achievements, to:

NAME AND ADDRESS OF FINANCIAL/TECHNICAL/IN KIND CONTRIBUTOR

Name or Organisation:

Contact Name: Position:

Postal Address:

Town: State: P/Code:

Phone: Fax:

Details of Activity Supported by the Partnership: PLEASE OUTLINE ON A SEPERATE SHEET

Success of Events/Activities:

Publications/Fact Sheets Produced:

Media Coverage of Partners/Groups Activities:

Example of Logos/Symbols Used:

Signed: Date: / / 2004



acknowledgement

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