

DSC Fundraising Now Corporate Partnership Reflection

A charity cannot market itself successfully unless it deeply understands what it can and cannot offer a corporate partner. As a follow up to I.G. Advisors' workshop at DSC Fundraising Now, consider the following questions and note your answers. These will focus your search for corporate partners and become the backbone of your pitch.

1. Reflect on your needs, ambitions and offering

Question	Your Answer
1. Are we a trusted brand? <i>Even as a small organisation, having a solid reputation offers fantastic potential to a company. Equally, charities that have been affected by controversy will have a difficult time developing partnerships until they sort out their internal affairs. If the latter is true, what steps need to be taken?</i>	
2. Is our cause especially attractive to certain types of companies or industries? <i>Interests align due to geography, values, goals and approach. The answers may be obvious – for example, health charities and pharmaceutical organisations; but out-of-box thinking can highlight other opportunities.</i>	
3. Is there an initiative we are working on that would benefit from a product, service or approach offered by a company? <i>In other words, can something a company is doing help you to achieve your social impact quicker or better or more cost effectively?</i>	
4. Can our work help to mitigate a risk that the company is facing? <i>Risks may include reputation issues, staff turnover, supply chain concerns, or negative social and environmental impacts in the communities in which they operate.</i>	
5. Are we working on a cause that the public considers especially important and current? Is our cause likely to turn some companies off?	

Hot topics, such as gender equality and climate change, may catch the attention of a company seeking to present itself as current and on trend. However, you should consider whether your cause would be considered too cutting edge for some.

6. Are we local, national, or international?

It is extremely valuable for the partners in a cause-related alliance to have similar structures and objectives. So are you a locally based charity, focusing on local causes, a large national campaign or an international NGO working on global issues?

7. Do we have a charismatic or well-recognised CEO, Chair, Founder or Advocate?

Such a person, who can garner media coverage and inspire the company's leadership and employees to participate, is of great value.

8. What do we really 1) need and 2) want from a corporate partnership?

Be honest. Is it funding? Is it training for the organisation or your beneficiaries? Is it exposure? Is it for a company to help you solve a social problem? Rank in order of importance. Know what you want, and what you do not want before you ask for support.

9. What resources do we have to manage a corporate partnership?

Do you have a dedicated staff member who will cultivate and manage corporate relationships? Be realistic about what you can offer.

10. Communications

Companies are often keen to leverage the communications opportunities of the partnership – by telling the story of the social impact, internally and externally. Your communications capability and strength of your assets will undoubtedly be considered.

2. Scope potential corporate partners

Only once you have assembled your answers to the above should you begin your in-depth research into your potential partners. Be thorough – review published reports, strategic plans and articles.

Search for thematic overlaps; services or products your organisation would benefit from; alignment in brand, values, goals, geographic focus; and previous / current social engagement and giving history.

3. Focus on building relationships

Regardless of whether there are any publicly stated timelines or contacts for dealing with corporate partnership requests, you will need to cultivate and build relationships to be successful. If you're struggling to find a direct connection to a company, try these tips –

1. Identify key decision makers within the organisation
2. Map networks that exist through your senior leadership and board to link you to your prospects
3. Use LinkedIn to identify and connect with useful contacts
4. Develop a tailored cultivation and action plan with a calendar of touch points and engagements

Corporate Partnerships

The landscape & how to succeed

Rachel Stephenson Sheff, I.G. Advisors, DSC Fundraising Now

About I.G.

As a London-based, globally-focused strategy consultancy in the social impact space, I.G. is positioned at the centre of the public, private, and not-for-profit sectors. Past and current clients include:

BILL & MELINDA
GATES *foundation*

SHIVA
HOTELS

DLA PIPER

unicef 

GMSP
GOD MY SILENT PARTNER
FOUNDATION

THE
OLD
VIC

PRIMARK®


sonnedix
SOLAR POWER PRODUCER




THOMSON REUTERS
FOUNDATION

 Investing in our future
The Global Fund
To Fight AIDS, Tuberculosis and Malaria

MALALA®
FUND


COACH

 **UN
WOMEN**

A Bit About Me



A Bit About You



Agenda



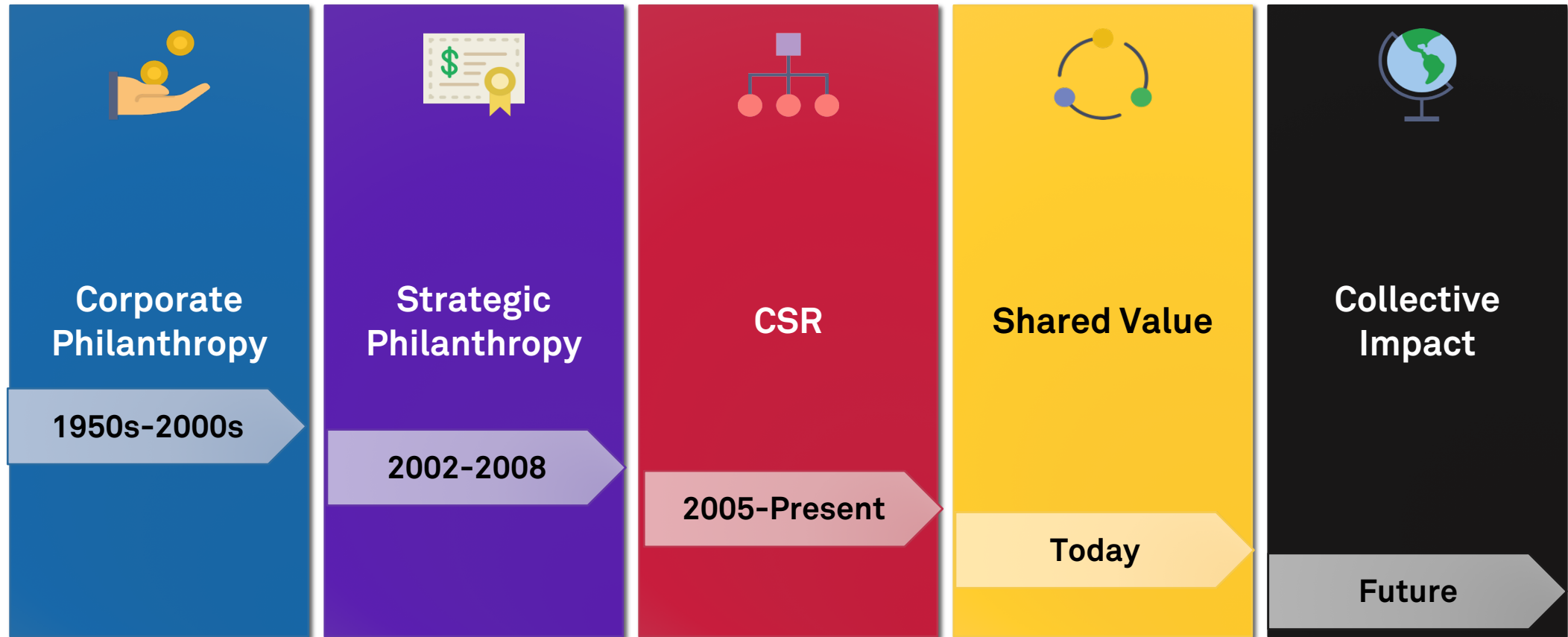
The Landscape

Inspiration

Best Practice

Exercises

History Lesson



Why Do Companies Partner?



**PERSONAL
PASSION**



**LICENSE TO
OPERATE**



BRAND VALUE



**COMPETITIVE
ADVANTAGE**

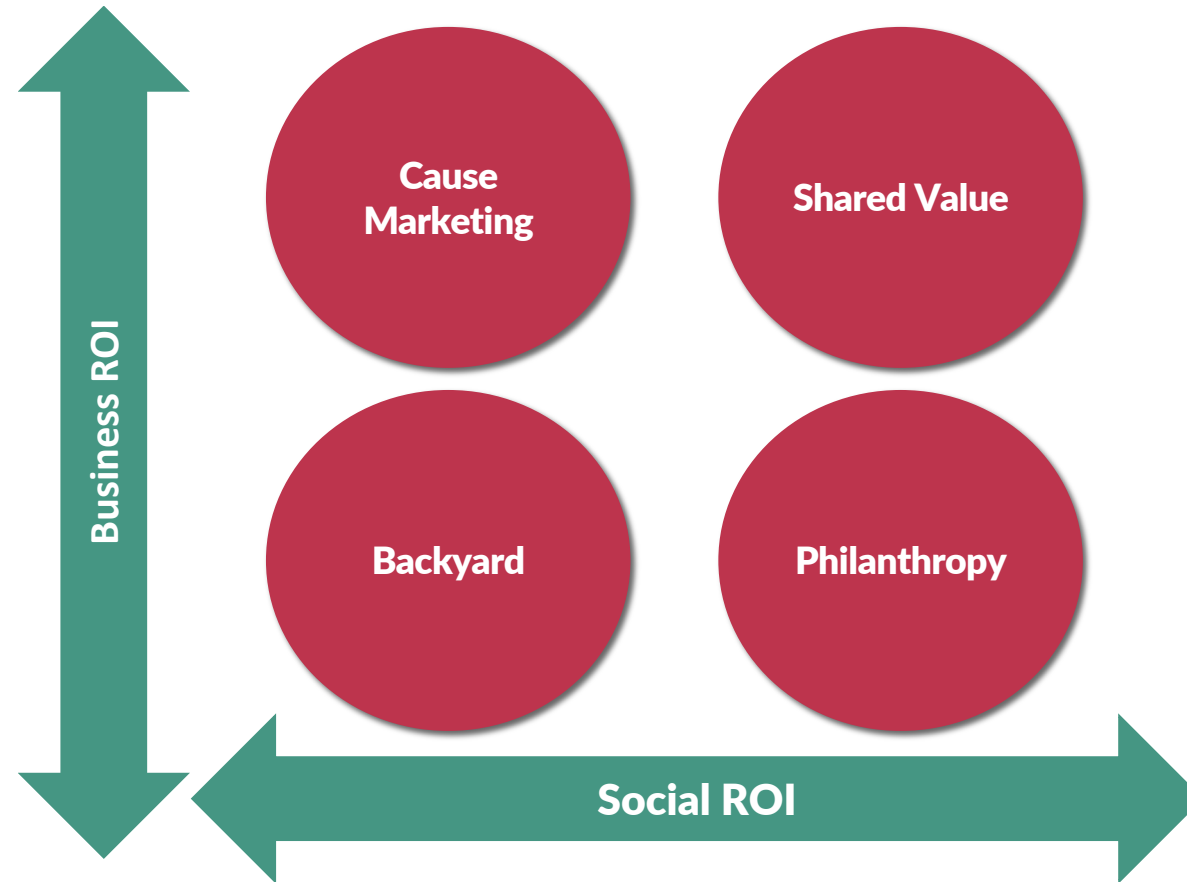


**RECRUITMENT &
RETENTION**



**LONG-TERM
SUSTAINABILITY**

Return on Investment



Transactional vs. Transformational



Transactional Partnerships

- One org. sets the agenda
- Exchange of resources for specific goods or services
- No requirement for transparency
- Risk mitigated by each organisation
- Contractual relationship with up front deliverables

Transformational Partnerships

- Co-creation process
- Shared common objectives
- Valuing of all assets
- Open and honest
- Shared risk
- Organic, adaptable deliverables

Funding Trends

There has been a significant shift away from 'donations' of money, services or products, to a more integrated responsible business model across many corporate sectors. **Key trends include:**

- Total philanthropic donations by the FTSE 100 have continued to fall year on year by 11% since 2014, and 26% since 2013, with this decrease being seen in six of the ten industries included on the exchange. Companies in the financial, oil and gas, technology and telecommunications sectors reported the largest decline in financial donations.
- Fewer companies are replenishing the depleting pool of money donated to charitable causes, with only 26 companies from the FTSE 100 donating at least 1% of pre-tax profits in 2016.
- 74% of business leaders say they are actively working to be engaged in deeper problem-solving partnerships to address core business issues in ways that create value for society (2016).
- 85% of business and NGO leaders say partnerships will become much more important over the next three years (2016).

[UBS Global Philanthropy Report \(2017\)](#), [C&E Corporate-NGO Partnerships Barometer, 2016](#), [Corporate Giving by the FTSE 100 \(CAF, 2018\)](#).

Misconceptions

Companies give to the causes they say they do

Overwhelmingly, corporate initiatives come as a result of a personal connection. If there's not a corporate foundation involved, their stated focus areas may just be a communications exercise.

Great causes & strong impact are enough

Companies are bombarded with requests for funds and partnership; everyone has a great cause that needs support.

Companies can be large cash donors

Cash giving from most companies is lower than you might think; the best partnerships figure out how to use a company's other assets, and target budgets that are not just CSR.

Companies care about social impact

Some do – but the best way to build a sustainable relationship is to think about the impacts on their business, too.

The Landscape

Inspiration

Best Practice

Exercises

TERN and Ben & Jerry's

TERN

Enabling refugees to thrive through
the power of their own ideas



Women Win and Standard Chartered



HOT & Accenture



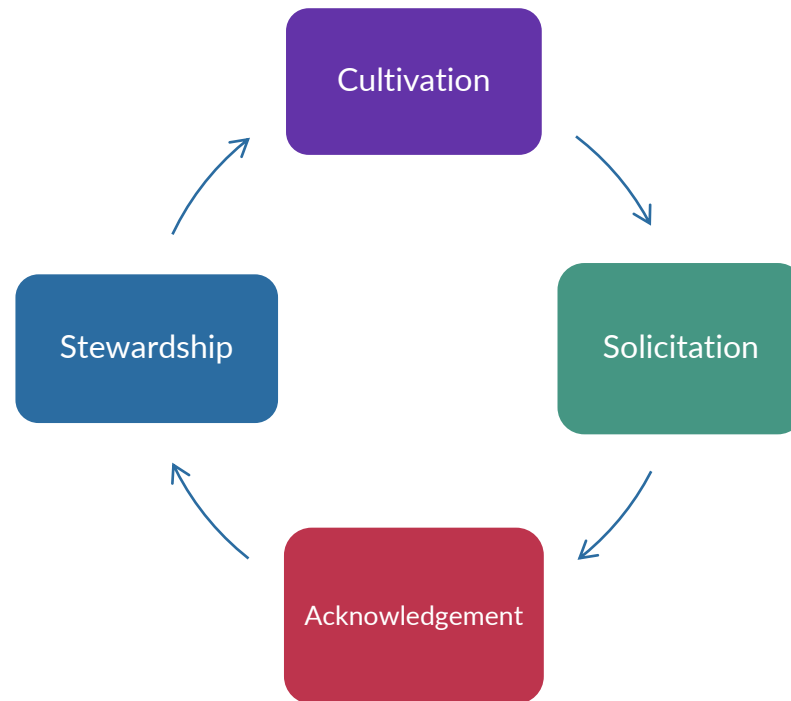
The Landscape

Inspiration

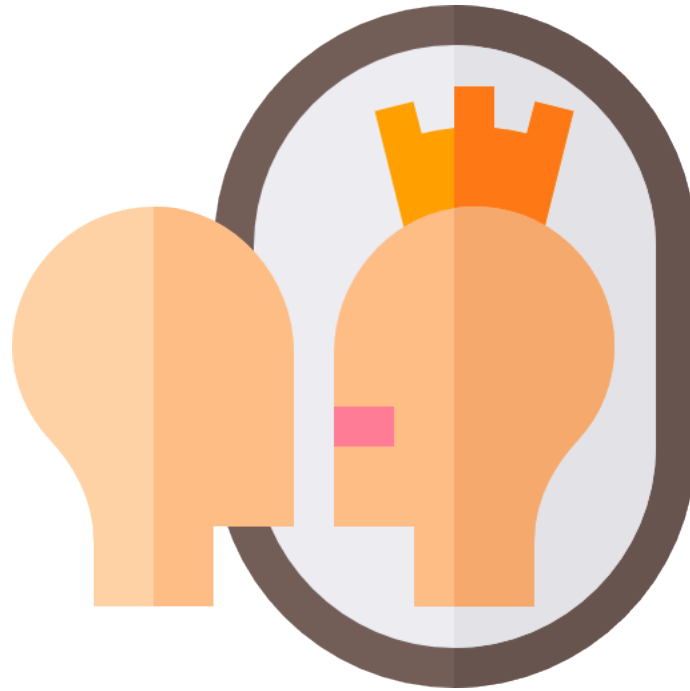
Best Practice

Exercises

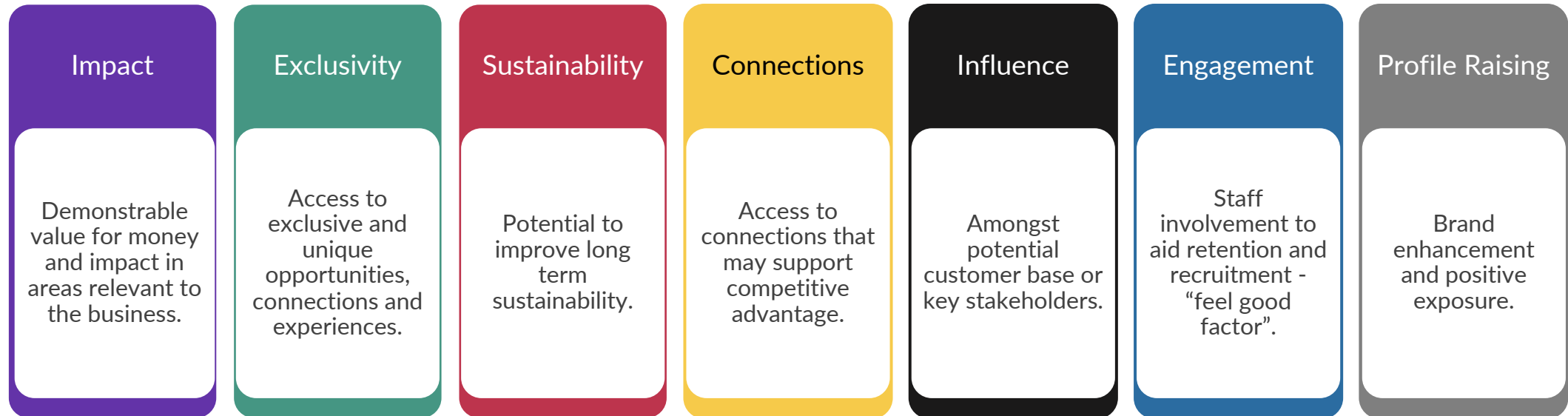
Donor Journey



What Companies Want to Hear



What is Valuable to a Business?



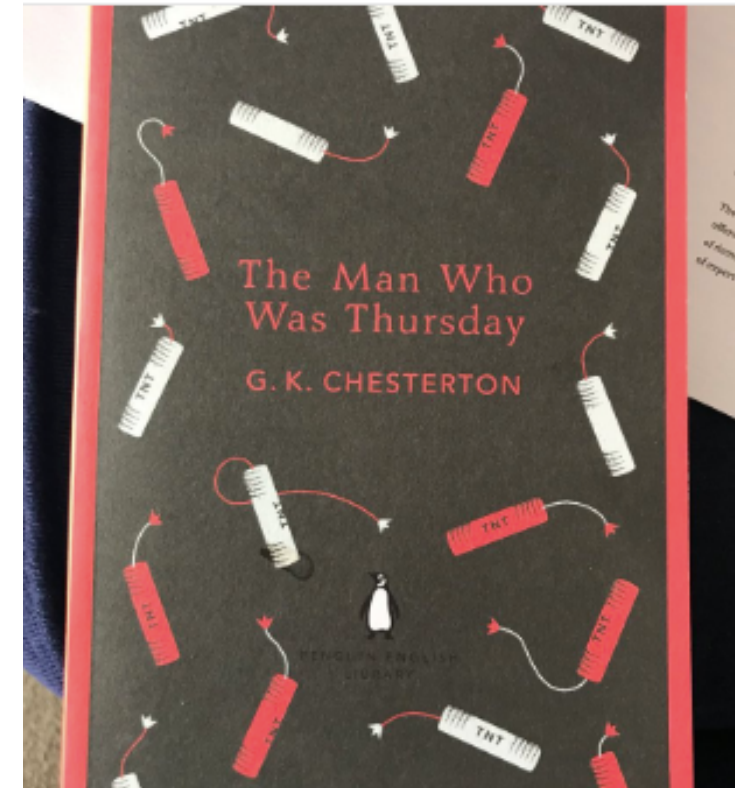
Donor Centred Design



These automatic soap dispensers don't work for black people

'I thought I was a ghost to some of these contraptions.'

metro.co.uk



Donor Centred Design

Surveys and
Interviews

Design
Workshops

Audience
Profiles

A/B Testing

Alternative
KPIs

~~Prospect Research~~ Relationships

- Treat cultivation discussions as part of the prospect research process
- Ask what companies want (don't assume public knowledge is up to date or accurate)
- Use your networks to grow themselves – create ambassadors!
- 12-18 months is the standard timeline from first contact to close of gift, and the best way to shorten this is via a personal connection

Hear it From a Corporate



Importance of Relationships



“A donation is never the beginning of a relationship
- there's always something that comes before.”

Nicolas Patrick, DLA Piper

A Podcast by I.G. Advisors

Shared-Value Approaches



"We're not interested in making a one-off in kind donation or grant - in most cases, we really try and take a shared value approach."

Kabir Kumar
Walmart.org

A Podcast by I.G. Advisors

Due Diligence on You

Financial Health

Other Partners
(Stakeholders
vs. Competitors)

Dynamic Leader

Alignment to
Tone and Brand

Story & Mission
Easily
Understood

Comms Assets
& Online
Platform

Due Diligence on *Them*

Ethics of
Industry

Reputation &
History

Alignment to
Tone and Brand

Genuine Value-
Add

Relationship
Management

Sustainability

Cultivation Best Practice

Dos

- Do your research
- Understand the brand (& potential business challenges / ambitions)
- Articulate the shared-value
- Why this? Why us? Why now?
- Leverage other partnerships
- Don't assume – come prepared but be open to co-creation
- Be clear on needs and expectations (strategic + day-to-day)
- Push back, as appropriate

Don'ts

- Ignore what the company says it is / is not interested in
- Use technical jargon
- Make an ask before understanding what the company needs
- Assume your contact is the decision-maker – ask them what they need
- End without suggesting next steps
- Forget the human element
- Forget your own due diligence

Shoestring Fundraising

Systems &
Templates

Central CRM

Supporters →
Advocates

Leverage
Ambassadors

The Landscape

Inspiration

Best Practice

Exercises

Dream Donor Pitch

#1 Imagine your dream corporate partner

- What kind of company? Where are they based?
- What services and products do they offer?
- What are their social impact concerns or interests?
- What key business challenges might they be facing?
- What is their motivation for a charity partnership?
- Have they had previous partnerships? What did they look like? What did they include?
- Type of support you want from them? (Remember donation-only relationships are harder to find)
- What questions or concerns might they have?
- Why are they the right partner for you?

#2 Craft (and present!) your pitch

- Show you understand the brand
- 'The Ask' should be specific, realistic and clear
- Approach from a co-creation perspective
- Highlight the value you can offer the business
- Give a clear vision
- Emphasise the need for, and impact of, the partnership
- If you can, tell a story
- Avoid jargon; use familiar language
- Answer - Why this? Why us? Why now?

Takeaways

Relationships
are Key

Shared-Value
Approach

Due
Diligence (x2)

Donor
Centred
Design

Reflection
Homework