Remaining relevant, and valuable as a social profit partner is increasingly difficult in an era of competition with brands who want to own ‘doing good’.

We’ll look at:

- Establishing fully integrated values based long-term strategic partnerships
- Techniques and tips to move your partners along the continuum from transaction to transformation
- The big trends impacting brands as they navigate evolving customer, employee and investor expectations
- Using a couple of case studies we’ll explore why cause is top of mind for brand leaders, why they are defaulting to cause marketing campaigns and how you can make the case for deeper, richer partnerships that touch all aspects of their business
Learning Outcomes

You’ll learn how to:

▪ Uncover the prospective partner’s objectives and identify shared values
▪ Approach potential corporate partners with solutions that will deliver benefits against objectives for their organizations
▪ Use a proven methodology to convert a transactional campaign conversation into the development of an integrated partnership
▪ Align corporate CSR objectives to the programs and assets that your organization can provide.
**Definitions**

**Corporate Social Responsibility (CSR)**

is a self-regulating business model that helps a company be socially accountable to itself, its stakeholders, and the public. By practicing CSR, companies are conscious of the kind of impact they are having on all aspects of society including economic, social, and environmental.

**Cause Marketing**

is defined as a type of Corporate Social Responsibility (CSR) in which a company’s promotional campaign has the dual purpose of increasing profitability while bettering society.

**Purpose Driven Brands**

are organizations who have consciously placed their “why” front and centre. This defines the services they provide, the products they sell, who they hire, how they promote and reward within the organization - in other words, how they do business.
Consumers Contributing to Cause

Traditional fundraising activities are in decline:
- **Events**: 6.2%
- **Peer to Peer**: 1.5%
- **Major Gifts**: 88% of all donations from 12% of donors

Canadians are contributing to cause in new ways:
- **Social Enterprise**: 43% of millennials prefer
- **Crowdfunding**: 41% donate to individuals
- **Microdonations**: Fail to move Canadians along the donation continuum

Sources: Peer-to-Peer Fundraising Canada Top Thirty Benchmarking Survey, 2017; Statistics Canada General Social Survey on Giving, 2013; Volunteering and Participating (GVP), Boomerang The State of Major Fundraising, 2015
Amplified Changes

52% would pay more

Source: Nielsen Sustainability Report, 2015

52% would pay more

Source: Nielsen Sustainability Report, 2015
What Business Leaders Are Saying

CORPORATE GOVERNANCE

Business Roundtable Redefines the Purpose of a Corporation to Promote ‘An Economy That Serves All Americans’

AUG 19, 2019

https://www.businessroundtable.org/business-roundtable-redefines-the-purpose-of-a-corporation-to-promote-an-economy-that-serves-all-americans
How Businesses Are Acting
How Businesses Are Acting

@BobbyFresh
Replying to @BurgerKing
Nothing validates my feelings of self-loathing and general apathy more than eating nutritionally deficient fast food delivered to me through my car door in a box as unhappy as I am.

@Clari_fairy
Replying to @BurgerKing
This tweet has me feeling a type of way because when was an assistant manager at BK I was so overworked and stressed that I cried in the walk in multiple times... bring this energy to your regional managers, smaller franchise owners and your employees.

@KylePlantEmoji
Replying to @BurgerKing
Do you provide health plans for all of your employees that allow them to see mental health professionals and afford psychiatric medications?
How Businesses Are Acting
How Businesses Are Acting

Is @Dove soap's marketing strategy
Before - black & dirty
After - Caucasian & clean
Also *who* is approving these ads?

An image we recently posted on Facebook missed the mark in representing women of color thoughtfully. We deeply regret the offense it caused.
70% of women still don’t feel represented in media & advertising. That’s why Dove is taking action with Getty Images, Girlgaze and women everywhere to create #Project ShowUs – world's largest stock photo library created by women and non-binary individuals to shatter beauty stereotypes. With over 5000 images of women photographed by women, we can offer a more inclusive vision of beauty for all media & advertisers to use.

#ShowUs More Women Like You
Charities have the expertise and credibility to drive deep dialogue and the theory of change to help for profit businesses shift orientation to become purpose driven brands.

Source: Level5 Strategy
Developing Values Based Partnerships

Framework Development
- Setting goals & objectives
- SWOT analysis
- Identification of areas of value creation
- Identification of needs
- Valuation

Management & Measurement
- Monitoring and evaluating through KPIs
- Course correction and refinement
- Capacity building
- Scaling up, inviting in additional partners

Partner Identification
- Market research
- Brand research
- Assessment of anticipated objectives and fit within defined framework

Program Development
- Co-creation is key to success
- Collaboration on timing, geography, rollout plan, etc
- Determine KPIs and mechanisms for measurement
- Determine partner responsibilities
- Establish go to market plans

Partner Discovery
- Establish LIA
- Determine business objectives
- Determine decision maker and influencer objectives

Co-creation is key to success
### Framework Development

- Identification of social outcome for FBC
- Assessment of what could be delivered through FBC's network and what supports would be required
- Impact assessment for the client, the organization and potential partners

### Partner Identification

- Assessment of sectors benefiting from FBC achieving targeted social outcome
- Market and brand research to develop tight target list

### Partner Discovery

- Business objectives: apply employee skills to deliver outcomes, ability to create an ownable brand position, earned media
- Decision maker: Tax professional & Influencer: HR executive

### Management & Measurement

- Pilot in year 1 with ability to scale up to national priority program

### Program Development

- Timing: outside of tax season
- Geography: mix of regions with emphasis on offices where there is strong employee engagement
- Co-creation of outcome goals and KPIs for measurement
- Collaboration on roll out plan inclusive of food banks
From Transactional to Transformative

**Transactional**
- Exchange of goods and/or services for payment
- Partner interaction is based on contractual terms

**Philanthropic**
- Focus is on charitable contribution of funds, time, resources
- Partner interaction is typically limited to impact measures around how funds are allocated

**Collaborative**
- Organizations share information and coordinate efforts but not decision making power
- Limited transfer or combination of resources

**Strategic**
- Partners share decision making, risk and reward
- Partners co-create objectives, share resources and jointly manage the partnership function
- Partners leverage one another’s core competencies

**Integrated**
- Strategically designed to achieve sustained impact and scale
- Potential to address systemic issues and create change at sector level

Source: KPMG
Delivering Value Against Objectives

The Nine Core Values of Strategic Partnership™

### ‘Above The Line’ Core Value Drivers
Deliver direct financial benefit for an organization which supplements primary operating revenue.

<table>
<thead>
<tr>
<th>Cost Abatement</th>
<th>Non-Traditional Revenue</th>
<th>Advertising / Sponsorship Revenue</th>
</tr>
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### ‘Below The Line’ Core Value Drivers:
Strengthen an organization’s primary operating activities, creating incremental net revenue growth.

<table>
<thead>
<tr>
<th>Audience Access</th>
<th>Audience Experience</th>
<th>Authority / Credibility / Trust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Expertise</td>
<td>Communication / Narrative</td>
<td>Competitive Advantage</td>
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Key Takeaways

- Recognize that partnerships can evolve over time as trust and impact are demonstrated - where you start is not where you will necessarily finish; they must be managed and measured.

- Develop integrated strategic partnerships from a position and mindset of shared risk and shared reward of equal or similar value.

- Planning, trust and a learning mindset are the essential ingredients when the creation of shared purpose is the desired outcome.

- CSR started taking hold in the 1970s, cause marketing was invented in 1983 & purpose driven brands only came to be in the 2000s – there is a lot still to learn, iterate and build on.
RAISE THE WORK

Metro Toronto Convention Centre

NOVEMBER 25-27, 2019