

RAISE THE WORK



Metro Toronto Convention Centre

NOVEMBER 25-27, 2019

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

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.

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

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Traditional fundraising activities
are in decline:



6.2%

Events



1.5%

Peer to Peer



88%

of all donations

Major Gifts

from **12%**

of donors

Canadians are contributing to cause in
new ways:



43%

of millennials prefer

Social Enterprise



41%

donate to individuals

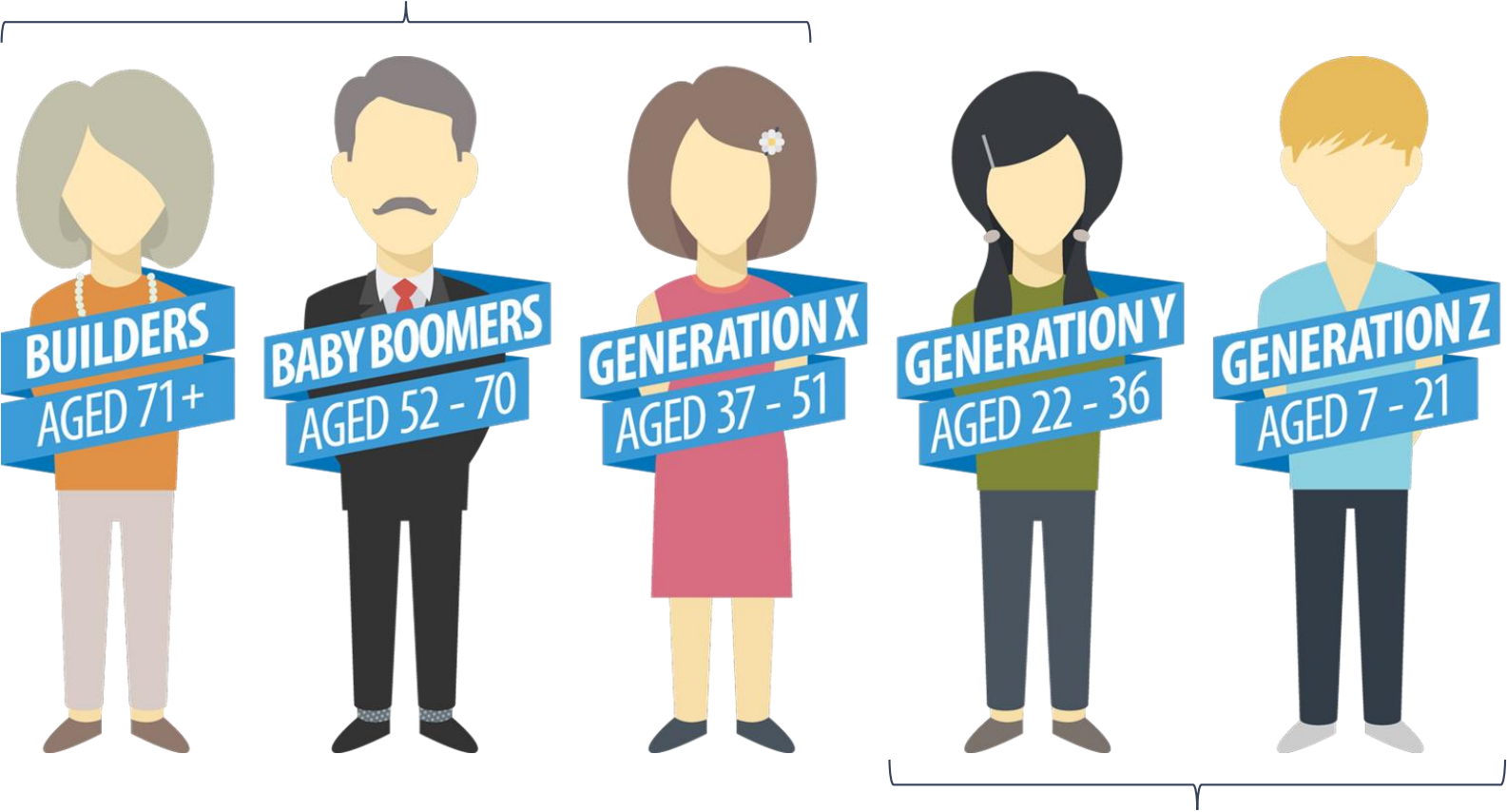
Crowdfunding



Microdonations

Fail to move Canadians along
the donation continuum

52% would pay more



72% would pay more

What Business Leaders Are Saying

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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

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Bobby Fresh @_BobbyFresh_ · May 2

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.

9 105 1.3K



Clari @Clari_fairyy · May 1

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

14 59 1.5K



Kyle @KylePlantEmoji · May 2

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?

28 153 2.7K



How Businesses Are Acting

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How Businesses Are Acting



Follow

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



10:25 AM - 8 Oct 2017

871 Retweets 750 Likes



62 871 750



Follow

An image we recently posted on Facebook missed the mark in representing women of color thoughtfully. We deeply regret the offense it caused.

2:27 PM - Oct 7, 2017

8,135 2,936 3,066

How Businesses Are Acting

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Project #ShowUs

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



Show all women as they are and they'll show the world what's possible.

70% of women still don't feel represented in media & advertising. That's why Dove is taking action with women everywhere to create Project #ShowUs – the first publicly accessible photo library to shatter beauty stereotypes around the world. With over 5000 images of women photographed by women, we can offer a more inclusive vision of beauty for all media & advertisers to use. Join us at Dove.com/ShowUs.



Opportunity for Charities

A Brand is the Value of A...



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.

Developing Values Based Partnerships

Framework Development

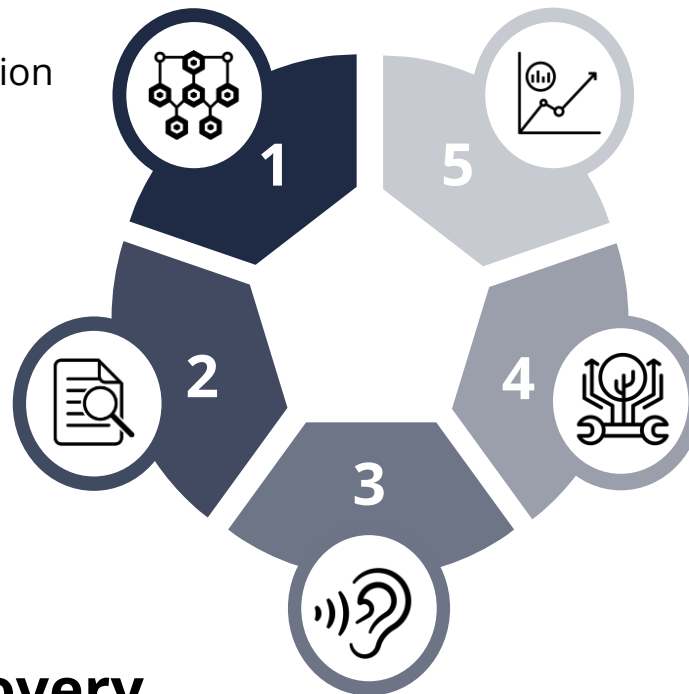
- Setting goals & objectives
- SWOT analysis
- Identification of areas of value creation
- Identification of needs
- Valuation

Partner Identification

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

Partner Discovery

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



Management & Measurement

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

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

Framework Development

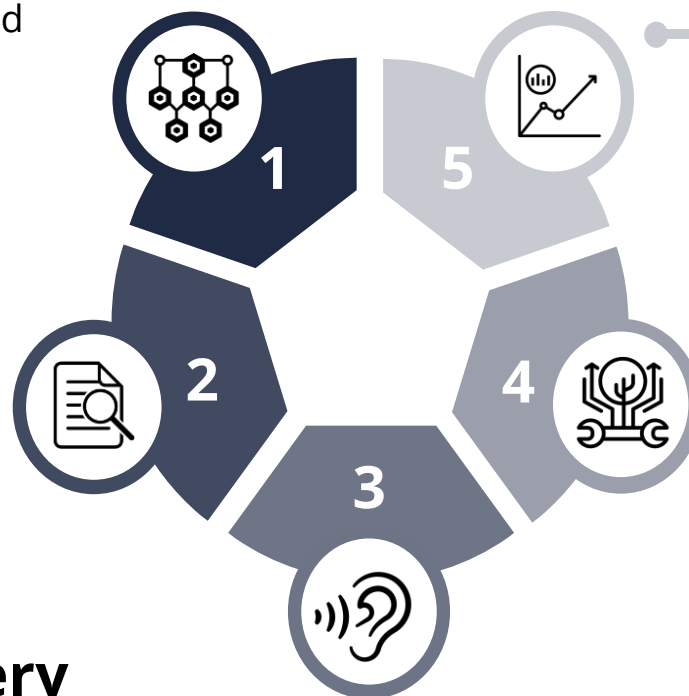
- Identification of social outcome for FBC
- Assessment of what could be delivered through FBC's network and what supports would be required
- Impact assessment for the client, the organization and potential partners

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



Transformative



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

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

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

- 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

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

Partnership Evolution

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From Philanthropic



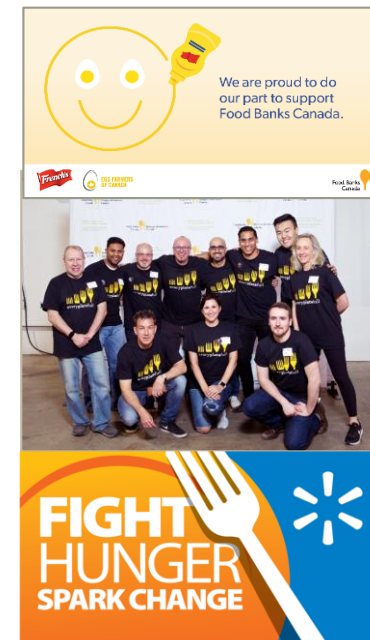
2016



2017-2019



2019



To Integrated



2020



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.

Cost Abatement

Non-Traditional Revenue

Advertising / Sponsorship Revenue

‘Below The Line’ Core Value Drivers:

Strengthen an organization’s primary operating activities, creating incremental net revenue growth.

Audience Access

Audience Experience

Authority / Credibility / Trust

Shared Expertise

Communication / Narrative

Competitive Advantage

- 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.



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