

# Strategic Partnerships

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## WELCOME & INTRODUCTIONS



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## ABOUT CHANGING OUR WORLD

Changing Our World is a trusted philanthropy consulting firm that advises leading corporations and nonprofit organizations.

- Extensive experience in developing and implementing strategic initiatives that enable corporations and nonprofits to achieve their goals
- In-depth knowledge of global philanthropy and nonprofit partnerships, marketing integration, and the ability to translate this into compelling solutions
- Success in creating programs that drive brand visibility, consumer appeal, employee goodwill and social impact

### FIRM SNAPSHOT

- Founded in 1999
- **An Omnicom Company (NYSE:OMC)**
- 100+ professionals
- **Four distinct advisory practices**
  - ✓ Corporate
  - ✓ Nonprofit
  - ✓ Research and Analysis
  - ✓ Digital



## TODAY'S WEBINAR: OVERVIEW

- Examine the corporate citizenship landscape and the implications for strategic partnerships
- Explore steps for strategic partnership development and stewardship
- Review trends in strategic partnerships and relevant case studies
- Questions



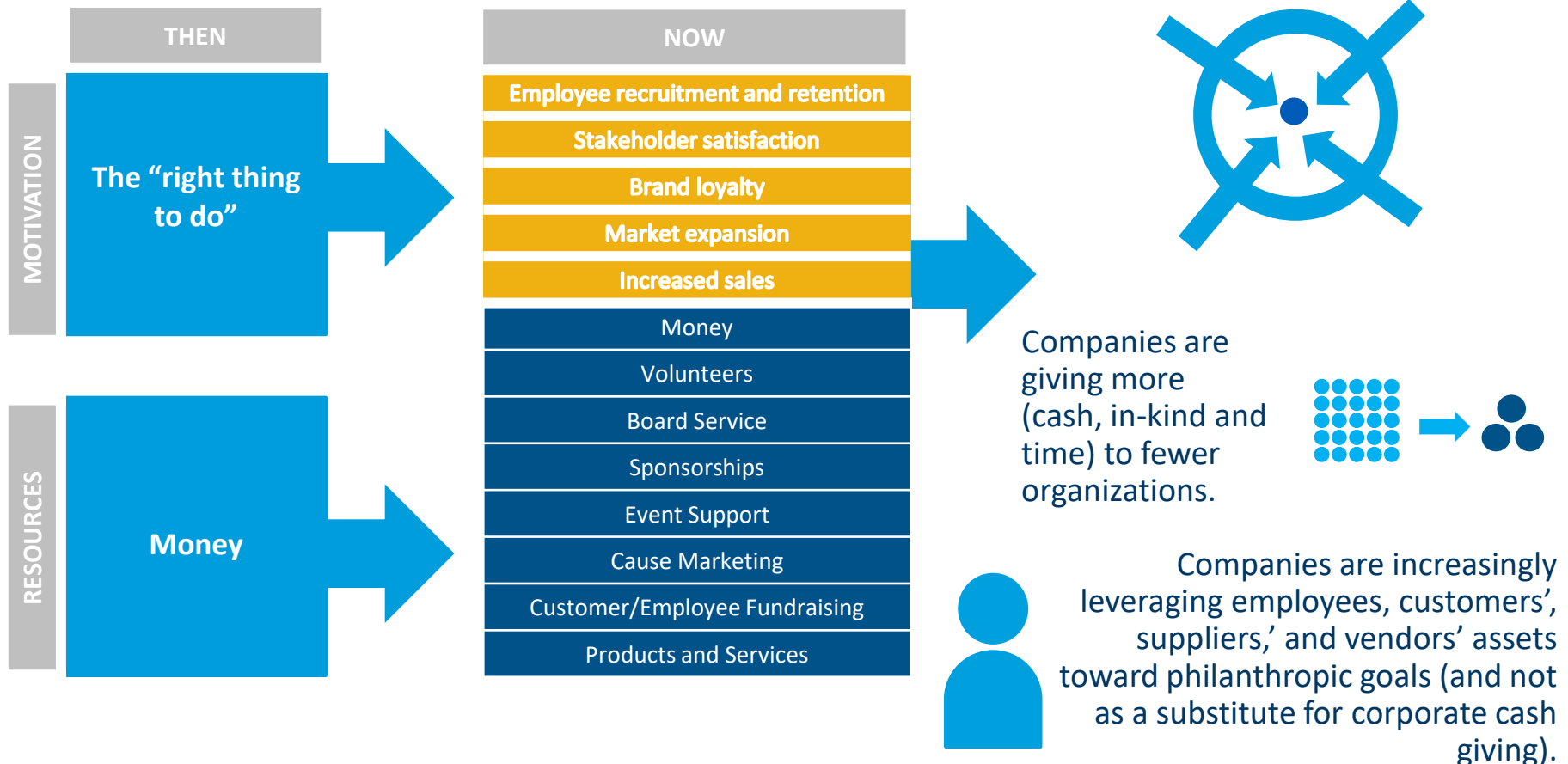
# CORPORATE CITIZENSHIP LANDSCAPE AND STRATEGIC PARTNERSHIP IMPLICATIONS

## THE EVOLUTION OF CORPORATE PHILANTHROPY

Where corporate giving was once done for **altruistic reasons...**

...corporate giving is now a **strategic business function.**

As a result, corporate giving is **more focused and more strategic.**



## THE PURPOSE OF STRATEGIC PARTNERSHIPS

Strategic partnerships are an agreement between two organizations to share resources or work together in the pursuit of common goals.



### It is:

- ✓ A tool to activate a corporate community involvement strategy (and a nonprofit's mission!)
- ✓ A collaborative relationship that has clear strategic value for all parties involved

### It is not:

- ✗ The goal itself
- ✗ A philanthropic or transactional resource exchange

## THE EVOLUTION OF CORPORATE-NONPROFIT PARTNERSHIPS

As corporate philanthropy has evolved into a more strategic function, so too have corporate-nonprofit partnerships.

Older Models	Newer Models
<ul style="list-style-type: none"> <li>• Many broad relationships with a diversity of institutions</li> <li>• Arm's length relationships, primarily driven by cash exchange</li> <li>• Generally favored nonprofit's interests</li> <li>• Intangible benefits for the donor</li> <li>• Minimal reporting required</li> </ul>	<ul style="list-style-type: none"> <li>• Selective engagement with fewer institutions</li> <li>• Vested commitment to the relationship, with multiple touch points</li> <li>• Clear benefits sought by donor</li> <li>• Mutual accountability for activation and shared goals</li> <li>• Emphasis on measuring results</li> </ul>



## DEVELOPING STRATEGIC PARTNERSHIPS AT THE LOCAL LEVEL

For community involvement practitioners in a global or national company who are leading nonprofit partnerships on a local level, there are some additional considerations to partnership development.

1

### Global/National Partner, Local Activation

- Get to know the partner's local leaders
- Understand and communicate the partner's *local* impact
- Learn from your peers in other locations
- Speak up! You are the on-the-ground eyes and ears; use this knowledge to advocate to improve the partnership if necessary

2

### Global/National Strategy, Local Activation

- Determine a tailored approach for you the unique needs of your community
- Communicate goals and metrics of the national strategy to partners
- Be diligent about tracking results and storytelling

3

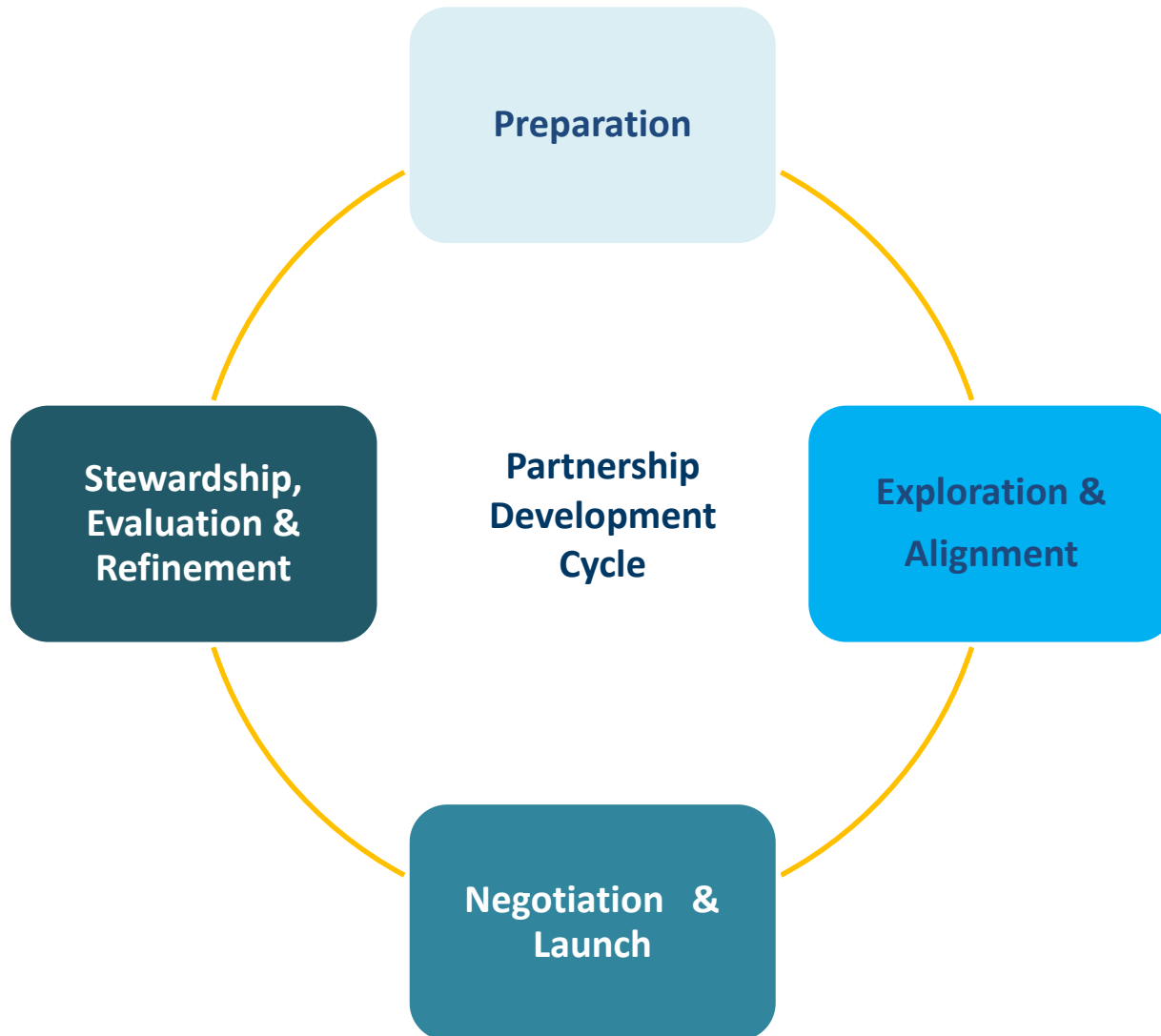
### Local Autonomy

- Consider existing or desired business relationships and goals
- Align strategy and partner selection with community needs and employee interests
- Discuss and coordinate goals and metrics with other locations, if possible



# STRATEGIC PARTNERSHIP DEVELOPMENT & STEWARDSHIP

## STEPS FOR SUCCESSFUL PARTNERSHIP DEVELOPMENT



## STEPS FOR SUCCESSFUL PARTNERSHIP DEVELOPMENT

### Preparation

- Understand where this partnership fits within a broader strategy
- Understand available resources and capacity
- Define and prioritize business goals
- Define social goals – outline a theory of change or logic model
- Secure internal approval/support

### Exploration & Alignment

- Conduct partner identification and vetting
- Narrow options by determining “strategic fit”
- Engage in exploratory discussions about possibilities
- Determine common interests

## DETERMINING ALIGNMENT

Each company will define successful partnerships differently. Below are some key criteria to consider in a potential nonprofit partner. Before initiating a partnership, it is critical to do some **internal prioritization** and **define success** around each of these dimensions.

- ☐ Reach/Service Volume
- ☐ Social Impact
- ☐ Geographic Scope
- ☐ Board of Directors
- ☐ Marketing/Communications Capacity
- ☐ Digital Capacity and Footprint
- ☐ Employee Volunteerism Opportunities
- ☐ Sustainability of Approach
- ☐ Financial Health/Size
- ☐ Roster of Funders
- ☐ Brand Equity/Reputation
- ☐ Measurement/Evaluation Capabilities
- ☐ Alignment to Community Involvement and Business Strategy
- ☐ Differentiation from Peers

## NEGOTIATION, STEWARDSHIP & EVALUATION

### Negotiation & Launch

- Agree on partnership goals
- Align implementation strategy with goals
- Establish partnership protocols and procedures
- Communicate partnership details to stakeholders

### Stewardship, Evaluation & Refinement

- Connect regularly to discuss progress
- Communicate important information quickly
- Summarize accomplishments; compare results to goals
- Discuss challenges and opportunities
- Determine if and how the relationship will move forward
- Use data to inform partnership adjustments
- Confirm agreement on future goals

## COMMON CHALLENGES

### Challenges

- Proactive communications and transparency about expectations
- Soliciting meaningful data points that align with business and social goals
- Ensuring employees and/or other business units are engaged with partner(s)



### Solutions

- Strong relationship management; regular check-ins
- Clear reporting expectations; multi-year partnerships
- Meaningful volunteer, skills-based, or in-kind opportunities



# TRENDS IN STRATEGIC PARTNERSHIPS



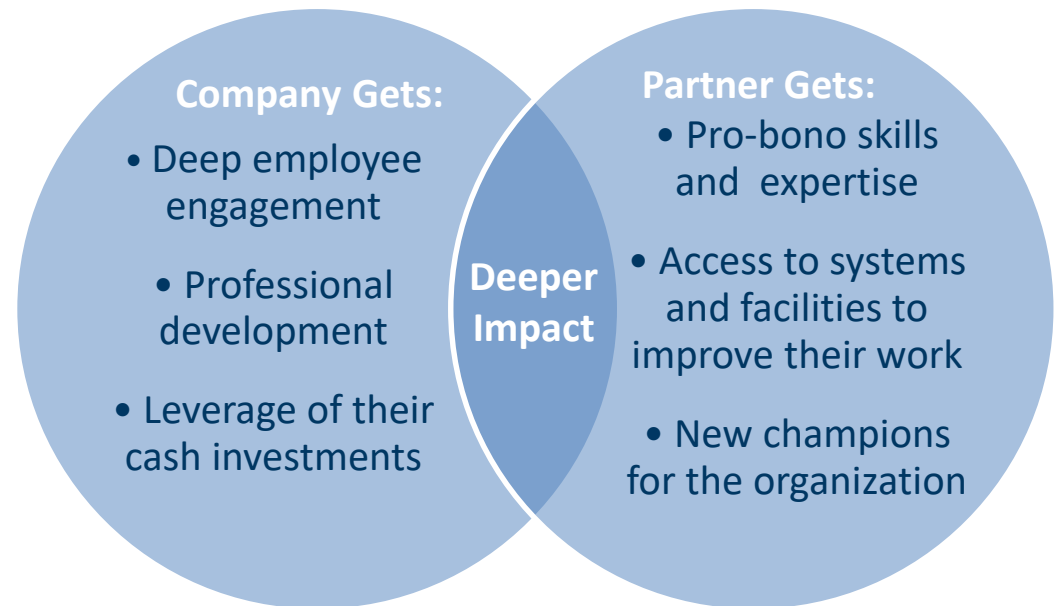
## LEVERAGING NON-CASH ASSETS AND SKILLS-BASED SERVICE

Companies are looking to draw upon a broad array of non-cash assets to support strategic partnerships – especially leveraging the expertise of employees for skills-based volunteerism.

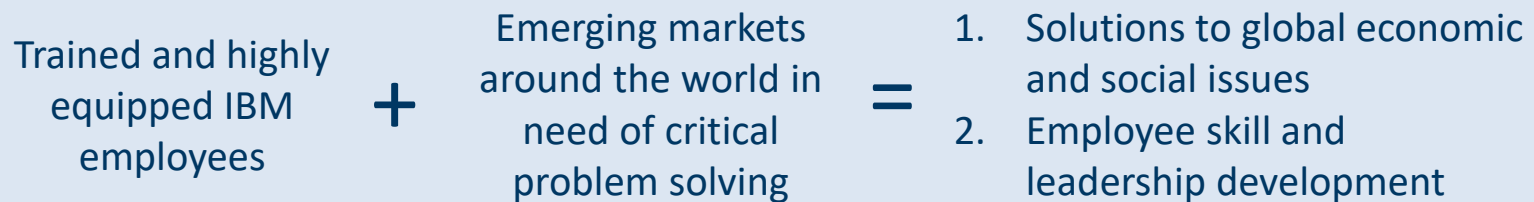
### Non-Cash Assets

- Products and services
- Employee time and talent
- Facilities, technology and systems
- Communications platforms
- Data and insights

### Skills-Based Volunteerism



## CASE STUDY: IBM - CORPORATE SERVICE CORPS (CSC)

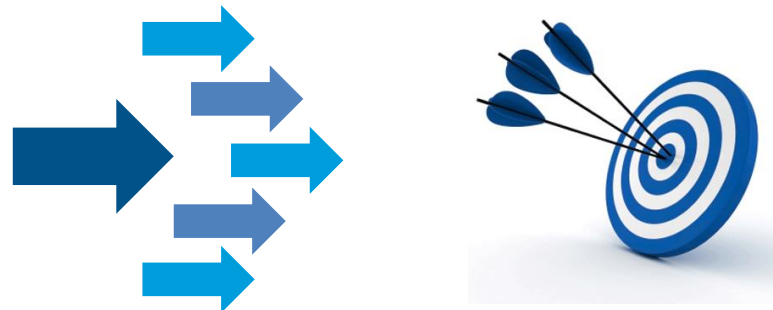


*IBM's CSC helps communities around the world solve critical problems while providing IBM employees with unique leadership development opportunities.*

- Top management prospects are trained and dispatched around the world
- Participants undergo three months of intensive training and education on host country
- Participants spend four weeks in groups of 10-15 working with local governments, universities, and business groups on initiatives ranging from upgrading technology, increasing international tourism, government-funded poverty alleviation initiatives, or improving public water quality.
- Since its launch in 2008, the CSC program has sent more than **3,000 participants** to nearly **40 countries** around the world, delivering over **\$70 million** in market value consulting on over **1,000 projects**.

## COLLECTIVE IMPACT

Companies are looking to foster collaboration and increase their impact by supporting collective impact initiatives – projects that bring together multiple partners to achieve common goals and a broader objective.





## CASE STUDY: STATE STREET - BOSTON WINS

Multi-year, \$20MM  
commitment from  
State Street

Pledge to hire 1,000  
youth in entry-level  
positions over four  
years

+

Five local nonprofit  
partners with unique  
strengths agreeing to  
work collaboratively

=

### One Goal

Strengthen Boston's future  
workforce by advancing job  
readiness for local youth

*Boston WINS aligns to State Street Foundation's focus of education and workforce development and allows the company to achieve a key business goal: increase hiring from the diverse talent pools in the communities where it operates.*

### State Street:

- Focused continuum from high school to career
- Selected partners based on prioritized criteria: impact track record, capacity to manage growth/scale, staff expertise, collaboration track record
- Developed metrics in partnership with nonprofits
- Engaging employees through volunteerism and matching gifts

## CO-BRANDED PARTNER CAMPAIGNS

When there is very strong brand and audience alignment between the company and a signature nonprofit partner, co-branded campaigns allow both partners to maximize marketing capacity, reach, and impact.

Successful co-branded campaigns have the following characteristics:

- ☐ Nonprofit mission and cause aligns with company brand and cause focus
- ☐ Nonprofit has a strong brand
- ☐ Nonprofit has strong marketing capacity (social media, website, newsletters etc.) and constituency overlap with the company
- ☐ Employees get involved
- ☐ Target audience is given a clear, simple call to action
- ☐ Mutually beneficial goals are set
- ☐ Common metrics are tracked and reported

## CASE STUDY: EQUINOX & MEMORIAL SLOAN KETTERING CANCER CENTER - CYCLE FOR SURVIVAL



Equinox time, marketing assets, funds; goal to help people “reach new heights”

+

Memorial Sloan Kettering brand, reach, programs, and mission

=

Constituents engaged in a movement – through donations and physical activity – to beat rare cancers

*Cycle for Survival fully integrates both Equinox and Memorial Sloan Kettering’s assets, priorities and missions. Expert marketing maximizes reach for the cause amongst both partners’ constituents.*

- Authentically founded as a grassroots effort by a Memorial Sloan Kettering patient and Equinox member
- Resonates with constituents’ interests – health and well-being – and aligns with partners’ missions – “reaching new heights” and conquering cancer
- Co-branded marketing materials and merchandise
- Cross-promoted through both partners’ public platforms; opportunity for participants to leverage personal platforms as well
- Five clear ways constituents can contribute
- Common metrics: raised \$34MM from 31,000 riders and 212,000 donors in 16 cities in 2017; funded 100+ clinical trials, research studies, and major research initiatives to date

## IN SUMMARY

**1**

**Understand and define your social and business goals**

**2**

**Align your partnerships to help achieve these goals**

**3**

**Make stewardship an ongoing priority**

**4**

**Engage employees and other business units**

**5**

**Assess and enhance/exit your partnership as necessary**



# Questions?

*Sign up for our newsletter, Social Strategist at:*  
[www.changingourworld.com/social-strategist](http://www.changingourworld.com/social-strategist)

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