

GUEST SPEAKER WEBINAR

**6 STEPS TO FINDING AND
ONBOARDING CORPORATE
PARTNERS**



Brad Offman
*Founder & Managing Partner,
SPIRE Philanthropy*

About CanadaHelps



Vision:

We envision a society in which all Canadians are committed to giving and participating in the charitable sector, and in which all charities, regardless of size, have the capacity to increase their impact.

Mission:

To inform, inspire, and connect donors and charities, and to democratize access to effective technology and education in the charitable sector.

For charities, CanadaHelps.org builds effective and affordable fundraising technology, and provides free training and education so that all charities, regardless of size, have the capacity to increase their impact and succeed in the digital age.

For Canadians, Canadahelps.org is a convenient, safe and trusted, one stop destination for donating to (once, monthly, or gifts of securities), fundraising for, or learning about any charity in Canada.

TRUSTED
SINCE 2000

\$1 BILLION
RAISED

2 MILLION
DONORS

21,800
CHARITY
PARTNERS

Guest Presenter – Brad Offman



Brad Offman Founder & Managing Partner – SPIRE Philanthropy

Brad Offman is Founder and Managing Partner of Spire Philanthropy, a management consultancy specializing in corporate-charitable partnerships and philanthropic advisory services. He is the former Senior Vice President, Strategic Philanthropy at Mackenzie Investments, former President of the Mackenzie Investments Charitable Foundation and Managing Director of the Mackenzie Charitable Giving Fund. Prior to joining Mackenzie, Brad served as Vice President, Development at the Toronto Community Foundation. Brad is currently on the Board of the V-42 Foundation, the CAGP Foundation and Benefaction Foundation. He is a past member of the National Advisory Council for Imagine Canada and is a founding partner and chief curator of the Corporate Partnership Conference.

Brad is past Chair of the Leave A Legacy Program for the Greater Toronto Area and former member of the Board of Directors for both Philanthropic Foundations Canada and the Association of Fundraising Professionals. He is a past Faculty Member for the CAGP Original Gift Planning Course and is currently on the organization's Government Relations Committee. He is also on the Editorial Advisory Board for Gift Planning in Canada.

Brad holds a Master's Degree in Business Administration and a Master of Arts Degree from the University of Toronto and a First Class Honours Bachelor of Arts Degree from McGill University in Montreal. He also holds the Certified Fundraising Executive and Master Financial Advisor – Philanthropy designations.

Corporate Partnerships are A Lot Like Dating

- Make the Decision to Date
- Take a good, hard look at yourself
- Set your parameters
- Reach out to Potential Partners
- Go on Dates
- Decide if we want to take it further

Or...The Six Stages of Partnership Building

1. Organizational Understanding
2. Asset Review
3. Review Existing Relationships
4. Identify New Opportunities
5. Cultivate Prospective Partners
6. Solicitation and Stewardship



I. Organizational Understanding

Organizational Understanding

- Mission
- Vision
- History
- The Elevator Pitch

Organizational Understanding

- All partnerships are different because all relationships are different
- Corporate partners are ALL looking for DIFFERENT things
- What is the one thing ALL partners are looking for?

The Answer

- CREDIBILITY
- All partnerships are built on a foundation of trust
- Without credibility, there cannot be trust
- Corporations gravitate to larger charities



II. Asset Review

Asset Review

- Board of Directors
- Programs and Impact Framework
- Sponsorable Properties
- Employee Engagement and Volunteerism
- Audience
- Brand
- Unique Assets

Asset Review - Board of Directors

- Composition
- Level of Engagement
- History
- Committee(s)
- Expectations



Asset Review - Programs

- Nature of Program
- Uniqueness
- Impact Measurement Framework



Asset Review - Sponsorable Properties

- Events
- Campaigns
- Distribution Channels



Asset Review - Sponsorship Valuation

- Formulaic Valuation
- Competitive Valuation
- Guessing

Asset Review - Employee Engagement

- Ease of Engagement – location, turnkey
- Group Volunteering
- Individual Volunteering
- Skills-Based Volunteering



Asset Review - Brand

- Awareness
- Segment Awareness
- Credibility
- Sub-brands



Asset Review - Unique Assets

- Unique events or experiences
- Unique audience
- Restrictions



Asset Review - Audience

- Take the broadest possible view
- Who does your organization speak to?

Asset Review - Audience

- Social media following
 - Facebook; Instagram; Twitter; LinkedIn; Other
- Newsletter(s)
- Donor Base
- Other Organizations/Partners
- Program Recipients
- Event Attendees
- Special Audience



III. Review Current Partners

Review Current Partners

- Review existing relationships
- Honestly assess them
- Meet with Partners – can we do more? Can we leverage different assets?
- Develop strategies and proposals to build enhanced relationship



IV. Identification of New Partners

Identification of New Partners

- Competitor review
- Lapsed partners
- Asset-based research
 - *Audience*
 - *Program-based*
 - *Board leverage*

Identification of New Partners

- How do I leverage my Board (and other volunteers)
- Who is interested in our audience?
- Who funds like-minded programs?
- What about lapsed/former partners?

Identification of New Partners

- Database research
 - Grant Connect
 - CharityCan
 - BIG Online



V. Cultivation of Partners

Cultivation of Partners

- Line up your resources. Who can and will attend prospect meetings?
 - You
 - President/ED
 - Board Members
 - Other strategic supporters

Cultivation of Partners – Track Your Progress

- Use your prospect tracking tools
 - Raiser's Edge
 - Salesforce
 - Other CRM
 - Excel



VI. Solicitation and Stewardship

Solicitation and Stewardship - Reaching Out

- LinkedIn
- ZoomInfo/Rocket Reach
- Email
- Google
- Leveraging Connections



Solicitation and Stewardship - Reaching Out

LET'S REACH OUT TO SOME PEOPLE.

Solicitation and Stewardship - LinkedIn Connections

- Always add a message
- If there's a real connection, use it (*It was great to meet you at the Partnership Conference*)
- "I'd appreciate the opportunity to connect. Thanks. Brad"



Solicitation and Stewardship- Emailing/Messaging

- Keep it Short
- Keep it Concise
- Keep it Brief
- Leverage Connection
- Use Correct Name

Brad's Email/LinkedIn message

John:

Thanks for connecting. I noticed you are on the PFC Board. I was on that Board from 2005 to 2013.

Our organization is very interested in exploring partnership opportunities with Coca-Cola. There is an interesting fit that we'd like to discuss.

Please let me know how we can advance this conversation.

Thanks.

Brad





Let's be clear about what partnership building is all about

- **RELENTLESSNESS**
- **PERSISTENCE**
- **PATIENCE**
- **YOU WILL BE IGNORED, GHOSTED, ETC, ETC**

What is the goal?

- The goal is to get a meeting, preferably in-person
- First meeting will likely be virtual

The Meeting - Preparation

- Overdress
- Research the hell out of the company and the individuals who will be attending
- Don't just research the company's CSR/community investment strategy
- Research products, acquisitions, news

Make it a Great Date

1. Ask the right questions
2. Listen thoughtfully and carefully to the answers
3. Be quick on your feet
4. Resist the urge to talk about yourself too much, even when asked!

Brad's Favourite Questions

- Tell me about your current role at xxxx
- Tell me about your business and your broader business objectives
- What are the primary objectives of your community investment or charitable partnership strategy?
- How do you think our charity can help advance your business objectives?
- How did you develop this strategy? Who was involved throughout the organization?
- How do you engage your employees around giving and volunteerism? Do you use external platforms like Benevity?
- Who is your target audience? Do you have different target audiences?
- What does a successful partnership look like to you?
- Have you done any cause partnerships/promotion in the past? How did you measure success? How will you measure success here?
- How else are you planning to market or promote this campaign? To Employees? To External Stakeholders
- Please walk me through the decision-making process. How do new relationships get onboarded?
- Tell me about some of your most exciting current partnerships and how they are advancing your business.

Meeting Follow Up

1. By any means necessary
2. The fine line between persistence and annoyance
3. How many times should we follow up?
4. Partnerships take eight hours AND eighteen months to build
5. Should we escalate?
6. When do we give up?

Negotiating and Closing

- Who is involved from an organizational perspective?
- What does the process look like?

Q&A



Questions?

Conclusion

Thank you!

Questions or Comments? Get in touch!



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