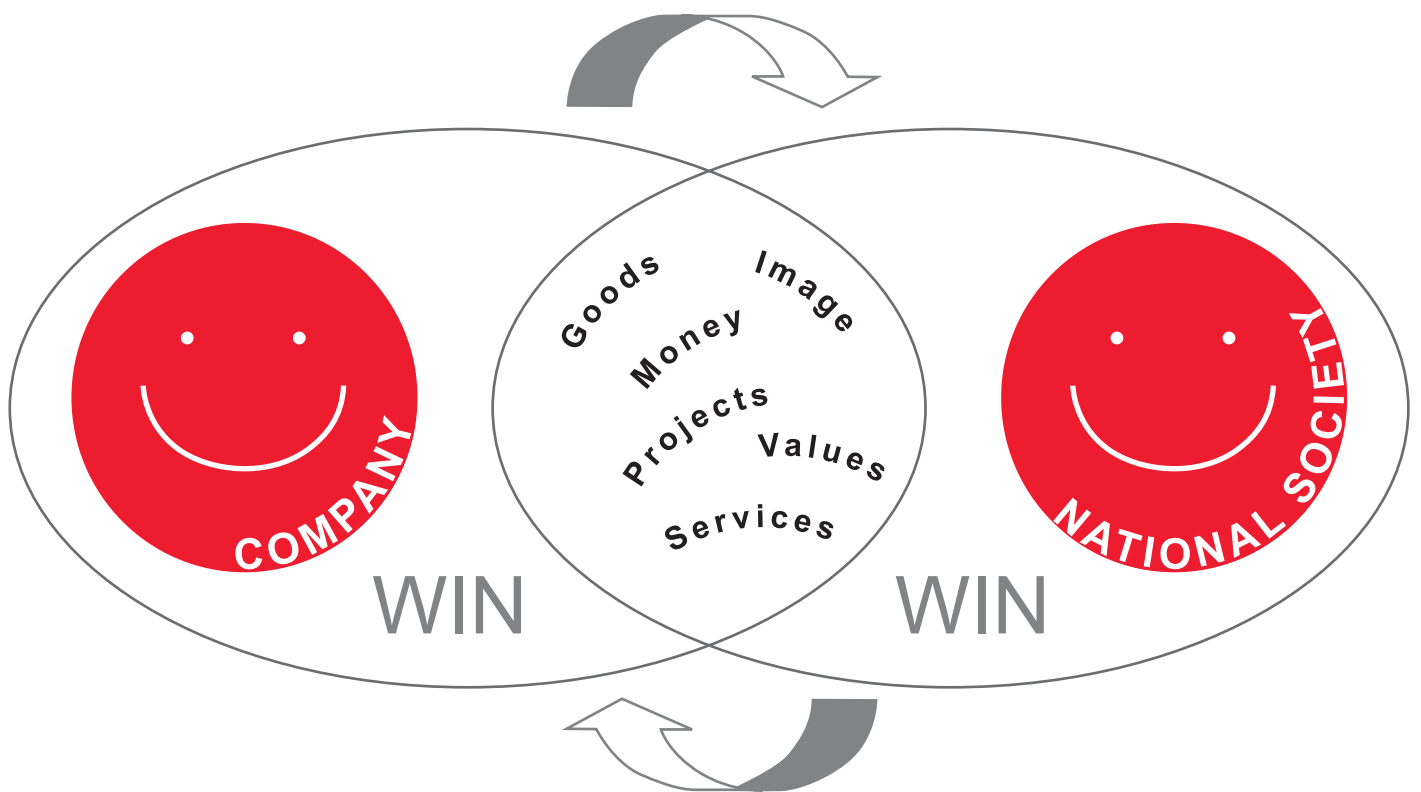


Corporate Partnerships

A win-win hands-on guide



International Federation
of Red Cross and Red Crescent Societies

Corporate Partnerships

A win-win hands-on guide

By: Norma Galafassi y Carla Ginobili

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Introduction

The 2020 Strategy, which will guide the work of Red Cross and Red Crescent over the next ten years, is to be the new base for the creation and adaptation of strategic and operational plans for National Societies of Red Cross and Red Crescent in the Americas and the rest of the world.

With the slogan “save lives and change attitudes”, the 2020 Strategy faces us with a group effort focused on: **do more, do better and work differently** to adapt to the challenges that arise in this changing world.

Do more, do better and work differently is a challenge that the Red Cross Red Crescent should face in order to achieve long term modernisation in the National Societies of Red Cross and Red Crescent. This will enhance its efficiency and effectiveness in working with people living in and facing situations of high vulnerability. So far we have been successful in expanding our volunteer networks, adding new partnerships and notably improving our accountability. However, we still have much to do to systematically help promote human dignity and peace in the world.

Within this context we see partnerships with companies as a key input to developing a more efficient, innovative and professional resource mobilisation process, which would allow diversification of funding sources while working to meet our humanitarian objectives. This issue requires an in depth study to understand how this approach would work in terms of content and benefits and in terms of advantages or disadvantages.

Today, companies are much more than just sectors for profit, they are also key players in contributing to social improvement and bettering people’s quality of life. The civil society that surrounds them (workers, consumers, customers, shareholders, students and families) is now more sensitive to the needs of the environment and it expects companies to address these new concerns.

The Red Cross Red Crescent, like many other social organisations, has the constant challenge of depending on different funding alternatives. This is not a new problem for the Red Cross and Red Crescent National Societies, which have developed mechanisms to support the many different ways of funding including such initiatives as individual donations, the sale of services, contributions from institutional donors, events, special corporate partnerships and many others.

Partnerships between companies and non profit organisations, may expand the operational capacity of the latter, while greatly promoting their main social commitments; which in our case is to **alleviate human suffering**. For this we need to have increased conviction, a challenge that involves compromise. Partnerships with the private sector, when properly planned and implemented through good coordination, definition of parameters and mechanisms for monitoring and evaluation, turn into initiatives that benefit both parties.

The private sector provides financial management, technology, logistics and substantial knowledge, which can complement the Movement's components. The exchange of knowledge and resources, and the contribution of experiences from each sector enable building innovative solutions that generate economic opportunities, create more efficient work processes and enhance the vision of both strategic sectors. This will allow National Societies of Red Cross and Red Crescent to achieve strategic benefits such as improved understanding of the problems they face in their humanitarian work while helping find remedies for them and achieving concrete results that ensure continuous improvement of its management.

Since the late nineties, the interaction of the Movement with businesses has increased dramatically. This will probably gain momentum as the number of companies grow, especially multinational companies which are interested in demonstrating their "corporate citizenship" by partnering directly with the causes of prestigious organisations such as the International Red Cross and Red Crescent and its components.

We hope this manual will serve as a tool and guide to the initiatives taken by the Red Cross Red Crescent National Societies in the Americas.

Sincerely,

Xavier Castellanos
Director
IFRC Americas Zone Office

A guide to win-win hands-on corporate partnerships

Many social organisations have the ongoing challenge of finding new ways of funding. This problem is not unknown to the National Societies of Red Cross and Red Crescent that are financed using a variety of methods ranging from individual donations, selling services, institutional donor contributions, special events, partnerships with companies, among many others.

As a business strategy, the development of partnerships with companies is a method worthy of in depth exploration, in terms of content and of benefits for both parties where such synergies and opportunities can open many doors.

Generally, the exchange of knowledge and resources and the contribution of each sector's experience empower the development of innovative solutions that generate economic opportunities, create efficient working methods and enhance the strategic vision of both sectors. Thus, the benefit for a company working with a National Society could be for example a better understanding of the problems we face in our work, and therefore access to solutions and rapid concrete results.

Within this context, the International Federation of the Red Cross and Red Crescent Societies, introduce this practical manual to strengthen the work of National Societies willing to work with corporate partners and to improve understanding in areas such as:

- Strengthening public image for both parties.
- Creating a bridge for the exchange of knowledge and skills between businesses and the Movement of Red Cross and Red Crescent.
- Creating a range of opportunities to expand financing alternatives that allow income diversification.
- Developing opportunities to create products / innovative processes that benefit both parties.
- Understanding new funding methods, which could reveal fresh options for fundraising and communication and allow diversification of income sources.
- Encouraging National Societies to experiment and, where a partnership with a company already exists, to expand their portfolio of options with new types of partnerships.
- Improving the execution of the method and preparing to comply with different steps.

Authors and acknowledgments

This manual has been developed under the leadership of the International Federation of Red Cross Red Crescent.

The authors Norma Galafassi and Carla Ginobili are from in2action, Fundraising & Communication, a group specialised in providing integrated solutions in communication and fundraising to non-profit organisations worldwide.

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Using this manual

The manual focuses on explaining the practical aspects to be taken into consideration when making partnerships with businesses: from the fundamental concept of what it means to make an alliance, why do it, and the types of partnerships that are possible, to chapters that talk about the importance of branding and show the steps that are necessary to achieve a partnership, policy framework the do's and the don't's, how to create good presentation materials, and many other topics.

Throughout the manual there are examples of several National Societies and the details of their successful partnerships. There are also boxes with hints or tips to emphasize different concepts and Appendixes templates to use when investigating potential partners or monitoring the relationship.

This manual is to be used by everyone involved directly in a National Society in relationships with companies from the Resource Development department to that of Specific areas of communication and partnerships. It is also very useful to circulate among decision makers in the organisation such as the Executive Director, President and members of the governing bodies, to ensure a uniform understanding of the issues.

Finally it is worth noting that the manual can be used as base material for the training of personnel involved in these issues, within the aforementioned areas and within any other area of the National Society as links with businesses can be started from many different areas within the organisation.



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Chapter 1

About corporate partnerships

Chapter 1 explains what corporate partnerships are and the intended objectives of each partner. It explores the concept of “mutual benefits” ending with a summary of the 10 key characteristics of successful corporate partnerships.

- 1.a** Win-win partnerships
- 1.b** Mutual benefits: clear objectives
- 1.c** Learning how to sell mutual benefits
- 1.d** 10 key things about corporate partnerships

1

About corporate partnerships

Chapter 1

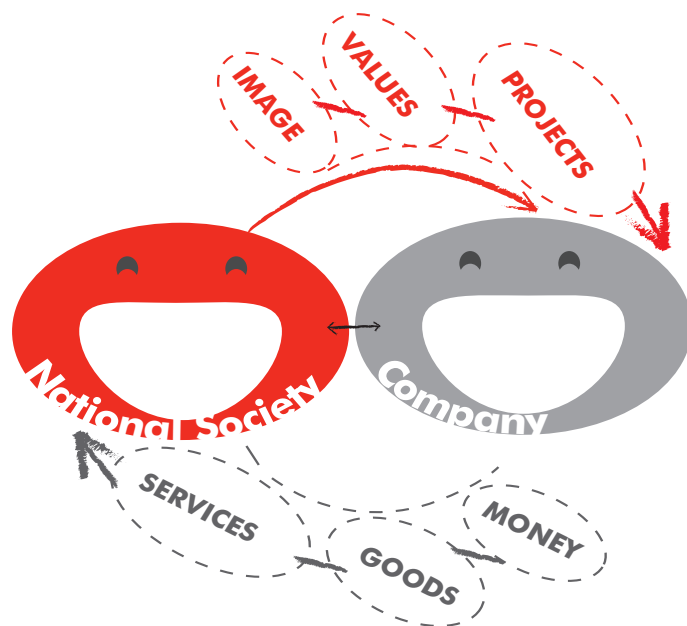
1.a Win-win partnerships

What is a partnership?

According to the dictionary a partnership is a relationship in which two or more people or organisations work together in a business venture; the state or condition of being a partner; participation; association; joint interest.

When talking about corporate partnerships or associations we mean the relationship between, at least two parts, where there is an exchange of tangible BENEFITS. This exchange is of something “valuable” to each part, where, both parts benefit from and are strengthened by the exchange.

In a partnership between a National Society and a company, the company would benefit from the Society’s positive attributes (e.g. its good image) and the National Society would gain from the company’s benefits (e.g. funds, services or products).



Simply, a true partnership is one where both parts win. It is about **mutual benefits** that enable the reaching of a common goal. The exchange must be **equal**. If the relationship loses its balance and, one part gets more than the other one or is seen as more important, then the relationship will not work properly. It is about finding true partners, a reciprocal relationship.

There are many types of corporate partnerships (fully explained in chapter 3), but the main differential characteristic is that **the company will make use of the brand and image of the Red Cross Red Crescent**.

Definitions according to the Movement*

The term “**partnership**” encompasses all relationships between a Movement component and a company, in which the Movement component grants the company the possibility of using its name, emblem/logo or image in its communication and promotional materials, thereby potentially creating a public association of image between the company and the Movement component. “**Public association of image**” refers to any connection in the mind of the public between the two organizations.



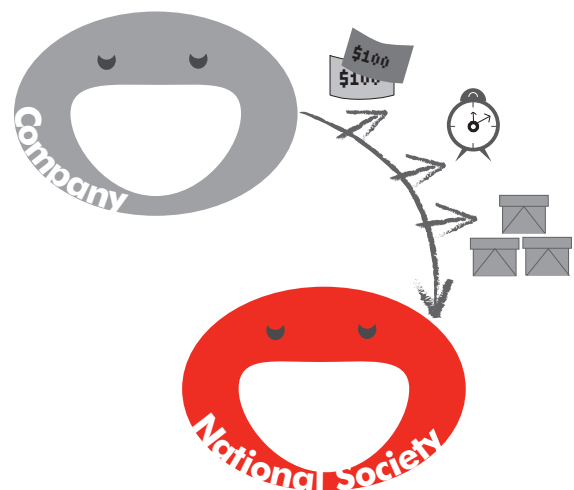
Strategic Alliance: relationships formed between a company and a component of the Movement that are focused on jointly addressing a goal of common interest (e.g., resolving a specific social problem) and involve the public association of image. These relationships are often multifaceted, long-term, and pool the complementary strengths of two organizations.

Why a corporate partnership is different from a company donation?

A typical donation involves at least two parts: the donor and the beneficiary, where the donor transfers, without charge, money, goods, services or even time to the beneficiary.

The fundamental difference with a partnership is that in the case of a donation, there is not a tangible exchange of benefits. The beneficiary, (in our case any of the National Societies), receives the donation and commits to using the resources on the agreed projects (could be general or specific funds). Donations are not necessarily one-off as there are companies who make regular donations that do not necessarily turn into a partnership.

During emergencies, National Societies usually receive donations from many different companies. **These situations could prove to be excellent door openers to future relationships leading to win-win corporate partnerships with these companies.**

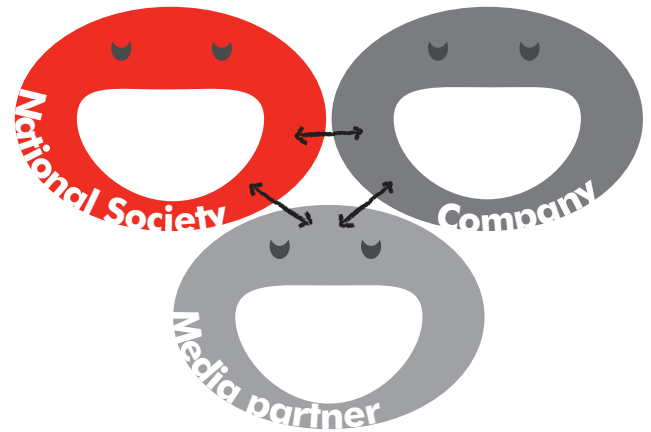


Donation example

*According to the International Federation of Red Cross and Red Crescent Societies Policy for Corporate Sector Partnerships

In most cases partnerships are established between two parts only: the National Society and the company. However the “partnership world” has no limits.

There are good examples of partnerships between 3 parts comprising of: the company, the National Society and a media partner. In this case the media partner helps to promote the partnership and also get first hand access to new content, thus empowering the whole exchange and making all brands involved more visible.



Partnership graphic between 3 parties

Mini case study

The partnership between the British Red Cross and Land Rover is a typical example of a simple partnership, i.e. between two parties. Land Rover donated 60 all-terrain vehicles to help the National Society respond to disasters and emergencies both at home and overseas. The donation coincided with the 60th anniversary of Land Rover and the 100th anniversary of the Royal Charter being granted to the British Red Cross by HM King Edward VII. These landmark anniversaries provided an ideal opportunity to celebrate the unstinting work of Red Cross volunteers, staff and supporters, as well as Land Rover’s contribution in helping global aid agencies over the years. This action was promoted in different communication materials where both logos were visible, thus providing image benefits for the enterprise.

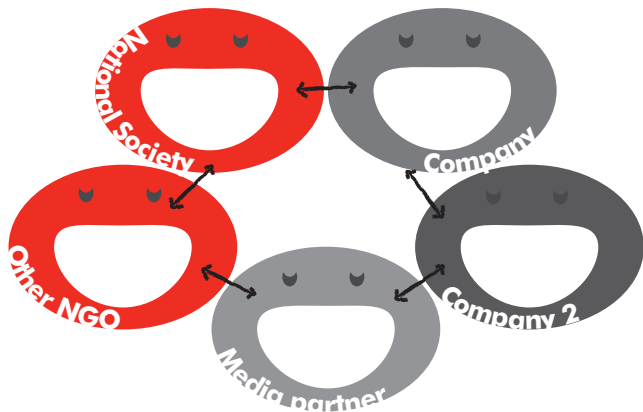
BritishRedCross



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The landscape of partnerships can expand by involving other companies, new organisations, media partners and even public entities.



Graphic of a complex partnership

Mini case study

“Juntos por África” (Together for Africa) was a more complex partnership, where several organisations and companies took part: the Spanish Red Cross, Intermon Oxfam, Doctors without Borders, Coca Cola and MWR. The partnership’s objective was to fundraise and recover pesetas (older Spanish currency) when the euro appeared as the new European currency. All funds raised were spent on social development projects in more than 38 African countries where the three non-profit organisations work.

All partners involved benefited from a positive campaign image, with their logos on the promotional materials and sale points. The enterprises were in charge of the distribution and replacement of collection boxes located in banks, restaurants, hospitals, hotels and other places.

The partnership managed to raise €600.000 that was split in equal parts between the three organisations.

Cruz Roja Española



Partnerships key words:

- Balance** **We are equal**
- Brand and image**
- Exchange**
- Mutual benefits**

1.b Mutual benefits: clear objectives



It is important that each of the parts involved in the partnership can achieve its goals. Listed below are the usual objectives of each part:

TYPICAL OBJECTIVES IN PARTNERSHIPS

For the company

- Improve institutional image, credibility and reputation by partnering with a “positive brand” like the Red Cross Red Crescent.
- Improve their own brand recognition.
- Improve positioning amongst clients.
- Increase sales and market share.
- Have a position as a caring company in touch with the problems that affect society such as disasters, climate change, emergencies or as a responsible company.
- Increase client loyalty.
- Attract, motivate and retain employees.
- Comply with their community welfare policies.
- Create networks and approach new target audiences.
- Improve the relationship with its own investors and share holders.
- Strengthen the relationship with local and national government.
- Receive tax exemptions.
- Reduce operative costs (recycling programmes, reutilisation of resources, etc.).
- Gain access to knowledge and experience that will help in the development and research fields.

For the National Society

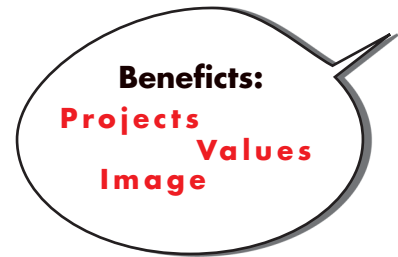
- Support fundraising and have a diversified funding strategy.
- Cover the needs of products or services (in kind).
- Achieve its information and communication objectives.
- Improve positioning and brand recognition.
- Achieve a bigger impact.
- Gain access to know how for projects.
- Gain access to new target audiences (clients, for example).
- Connect with the company social networks or stakeholders (employees, suppliers, distributors, and others).
- Acquire new donors or members.
- Cultivate donors.
- Have access to marketing knowledge and tools, strategy development and other skills that the company might share.
- Reduce admin and general costs.

1.c

Learning how to sell mutual benefits

Because the basis of any successful partnership is the active exchange of benefits where everybody wins, it is important to learn how to sell this idea and motivate the prospect corporate partner right from the beginning. This is **radically different** from the classic case for support, that organisations use in order to get donations from individuals or institutional donors, where the donor becomes involved by being made aware of a “good” (urgent, real and important) problem that must be solved, and that the National Society can provide a solution for. The case for support works with the “problem solution” formula.

In the partnership world, the message is DIFFERENT and, the negotiation should begin with a presentation of the win-win situation, by clearly showing the benefits of the partnership to the company. The final objective is to achieve a long-term relationship.



In order to learn how to ‘sell benefits’, it is important to understand the current context in companies, and how best to approach them (in detail on chapter 2) to create value proposals with the appropriate tone, language and strategy to meet the expectations of these groups. This manual will provide you with ideas for the different types of partnerships (chapter 3), it will also explain the importance and value of the Red Cross Red Crescent brand (chapter 4) illustrating points with examples and suggesting useful tips to create good presentation materials and proposals (chapter 7).

1.d

10 key things about corporate partnerships

- 1..... There has to be an **EXCHANGE** of benefits, so that all parts involved gain from the partnership.
- 2..... A successful and lasting partnership takes great effort and time, it can even take years. It is about a **LONG-TERM PROCESS** that contributes to achieving sustainability.
- 3..... The partnership does not necessarily mean that the National Society receives funds; it can also be an association that receives **GOODS and/or SERVICES** or **information and communication** to the National Society.
- 4..... The corporate partner should be helping to fulfil a need identified by the National Society and it must constitute a **QUALITY** exchange. It is not acceptable to start a partnership for the sake of having a partner if there is no valuable exchange for your National Society’s work and mission.
- 5..... Any corporate partnership agreement entered into by a National Society should be subscribed according to the **PRINCIPLES** and **VALUES** of the Red Cross Red Crescent.
- 6..... Always **LOOK AFTER** the Red Cross Red Crescent brand and emblem, never underestimate its value.
- 7..... In order to develop successful partnerships, National Societies should **INVEST** in human resources, seed funds, infrastructure, time, etc.
- 8..... Everyone within the National Society, from the governing bodies to the staff, should be internally **ALLIGNED** to achieve good results.
- 9..... As with any kind of relationship, a corporate partnership will grow only if regularly **CULTIVATED**; it is therefore fundamental to understand how companies think, to build an association with them.
- 10..... Every step and process involved in a partnership must ensure **TRANSPARENCY**, especially when reporting results back to the company. If we are “partners”, accountability is a key asset to building trust.

Chapter 2

Context: Why enter into a partnership?

The corporate sector is a different 'world' from that of the National Societies sector. Companies' objectives are different. This means there are differences in their ways of working, their dynamics and their timing. Therefore to develop successful partnerships it is fundamental to learn how to think from the other side.

- 2.a** What is happening in the corporate world today?
Learning to think from the other side
- 2.b** What motivates a company to enter into a partnership with a non-profit organisation?
- 2.c** Partnerships from the Red Cross Red Crescent perspective
- 2.d** Trend: the company and the organisation as true and lasting partners

2

Context: Why enter into a partnership?

Chapter 2

2.a

What is happening in the corporate world today? Learning to think from the other side

The corporate sector is a different ‘world’ from that of the National Societies sector. Companies’ objectives are different. This means there are differences in their ways of working, their dynamics and their timing. Therefore to develop successful partnerships it is fundamental **to learn how to think from the other side** and to look at what is happening from the company’s viewpoint.

What are their priorities and challenges?

How do the people you are dealing with do their job on a daily basis and what motivates them? The more you get to know about them, the better you will be able to communicate ideas and bring them attractive proposals, which will lead to positive outcomes.



© British Red Cross

Companies face different challenges, depending on:

The size of the company

Within the corporate world companies face different challenges according to their size. Large national or international companies have several members of staff involved in decision-making processes. National Societies could approach a specific department to develop a partnership with them: marketing, public relations, CSR areas, etc.

In the case of small and medium size businesses, the owners might be sole decision makers, so proposals would need to be sent directly to them.

Depending on their size and work scale, companies have different decision making processes, timing, investment levels, institutional policies and budgets.

Products or services

Another key aspect is whether a company sells products or services. Service providers are generally keener on developing partnerships with non-profit organisations because they already rely on institutional image strategies whereas in the case of companies that produce mass consumer products, it might be easier to develop cause-related marketing activities.

Tax situation

Some companies might be interested in entering into a partnership with a National Society if they could receive tax exemptions or incentives. This particular aspect is closely related to the laws and regulations of each particular country. It is then essential to be familiar with local and national tax laws, as this in many cases, could be a selling point in corporate partnership negotiations. Furthermore, various companies in many countries, create corporate foundations which distribute funds for non profit organisations.



Identify the key representative characteristics of the prospective partner in order to know how to approach them and develop a partnership.

2.b

What motivates a company to enter into a partnership with a non-profit organisation?

There are basically two kinds of motivation:

- 1 Motivation related to **marketing**; to differentiate from competitors, increase sales and net profits.
- 2 Motivation related to generating **added social value** by supporting public welfare causes and transforming the company into a socially responsible player (corporate social responsibility, CSR).

TIP It is also key to recognise that, regardless of the initial motivation, companies measure their success according to their profit, which reflects on their sales reports, brand image and other benefits.

1 Marketing motivators: the needs of positioning and branding

In the last decades, companies have invested large amounts of money developing strategies to reach their target audiences effectively. They are increasingly aware of the problems that affect the society in which they live, for example environmental and human rights issues. This, as part of their overall business strategy, has given their customers a louder voice.

Marketing laws indicate that companies today do not fight their battles at the supermarket counters but in the minds of people. Consumers can choose among a wider range of products and brands available which means that companies are becoming increasingly competitive.

In this context companies invest large budgets in advertising to create strong positioning concepts for their brands, products or services to differentiate them from their competitors.

The “battle” takes place in the consumers’ minds.

Positioning:

To create a unique position in the consumer's mind about a brand, product or service.

This position is not only based on the strengths and weaknesses of the product or brand, but also the positions of other companies in the market. With this in mind National Societies have an excellent opportunity to create marketing partnerships with companies who are looking for that differential positioning, a difference that **ADDS PLUS VALUE** for them and their customers.

Marketing surveys show that consumers favour activities where companies are involved with social causes:

- According to The 2009 "Global Edelman Goodpurpose Study", developed with global surveys, 71% of respondents believe that brands spent too much money.
- 2 out of 3 respondents when given brands of equal quality would choose the one that represents an association with a good cause.
- 83% of respondents would be willing to change habits if doing so would help protect the environment.

Today's consumer selects a product not only for its quality and price, but also for its perceived image. This last idea leads to our next point, as a growing number of people feel positively towards the level of corporate social responsibility of a company.

TIP National Societies might develop long-term partnerships with companies beyond their initial motivation. For instance, if a company has a marketing driver, it might start with a marketing partnership and then develop further. The National Society might look for new ways to influence the company's social welfare activities and make an effective change in the communities in which they work.

2 Motivation from the social value perspective: about CSR.

The corporate social responsibility (CSR) concept began as an idea, and is now a growing trend around the world. How to define it? Let's see what the experts say.

Some definitions:

"Corporate social responsibility encompasses not only what companies do with their profits, but also how they make them. It goes beyond philanthropy and compliance and addresses how companies manage their economic, social, and environmental impacts, as well as their relationships in all key spheres of influence: the workplace, the marketplace, the supply chain, the community, and the public policy realm." (Harvard Kennedy School).

"Corporate social responsibility is the continuing commitment by business to contribute to economic development while improving the quality of life of the workforce and their families as well as of the community and society at large" (World Business Council for Sustainable Development).

"CSR is the acknowledgement by companies that they should be accountable not only for their financial performance, but for the impact of their activities on society and/or the environment. Discussions surrounding the concept are still at an evolutionary stage, although the principles of CSR have long been part of business strategy." (Confederation of British Industry).

"CSR as a company's commitment to operating in an economically, socially and environmentally sustainable manner, while recognizing the interests of its stakeholders, including investors, customers, employees, business partners, local communities, the environment and society at large." (Canadian Business for Social Responsibility).

"Corporate responsibility as the management of a company's positive impact on society and the environment through its operations, products or services and through its interaction with key stakeholders such as employees, customers, investors and suppliers." (Business in the Community).

"Social responsibility is the responsibility of an organisation for the impacts of its decisions and activities on society and the environment, through transparent and ethical behaviour that

- contributes to sustainable development, including the health and the welfare of society
- takes into account the expectations of stakeholders
- is in compliance with applicable law and consistent with international norms of behaviour; and
- is integrated throughout the organization and practised in its relationships."

(International Organization for Standardization as part of its work on the new Guidance Standard on Social Responsibility, ISO 26000).

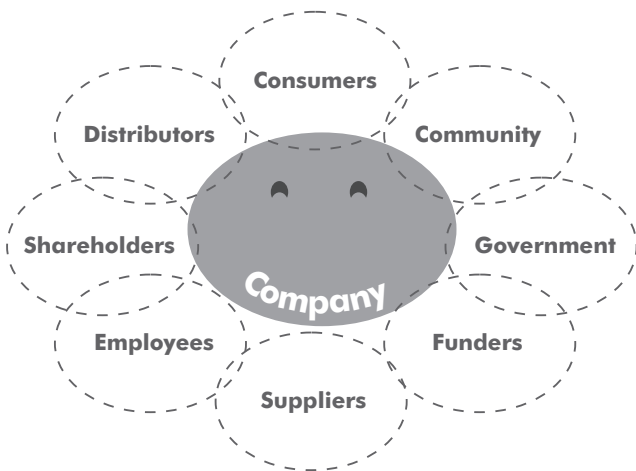
There are many corporate social responsibility definitions, but current trends indicate that companies include within their commercial activities:

- Ethical values
- The people
- Consumers and the environment

To achieve public welfare

The CSR concept links the company’s business success with the customer’s perception of their level of social commitment.

Recently we have seen commercial businesses directed increasingly to satisfying the needs of its stakeholders. Stakeholders now being not only profit driven shareholders, but also employees, suppliers, clients, union groups, the government, competitors, the community. Therefore, for many, a company’s responsibility means the responsibility towards those groups.



The responsibility level of a company can be measured by the commitment it shows to each of these stakeholders groups. The company becomes then a “corporate citizen” with rights and with duties to each group.

It is not...

- It is not philanthropy
- It is not relationships with the community
- It is not corporate partnerships with non-profits
- It is not support for social projects
- It is not something that only large companies can do

What can a company do in terms of CSR for each stakeholder group?

| Consumers | Suppliers | Shareholders | Government |
|---|---|--|--|
| <ul style="list-style-type: none"> • Quality products • Clear information • Cause related marketing | <ul style="list-style-type: none"> • Transparent bidding processes • Compliance of payments | <ul style="list-style-type: none"> • Truthful information • Social leadership | <ul style="list-style-type: none"> • Tax payment • Take part in negotiation rounds • Corruption control |
| Distributors | Employees | Financing | Society in general |
| <ul style="list-style-type: none"> • Compliance of contacts • Fair and transparent conditions • Equal conditions | <ul style="list-style-type: none"> • Legally hired • Balance of work-private life • Equal opportunities • Social initiatives that include them: payroll giving, corporate volunteer, etc. | <ul style="list-style-type: none"> • Compliance with conditions • Transparency | <ul style="list-style-type: none"> • Caring for the environment • Support to community leaders and non profit organisations: donations, partnerships, sponsorships • Other social initiatives |

Is it a fashion?

CSR is a concept that many companies truly believe in, while others see it as a “fashion trend” to follow or as a marketing opportunity, an interesting niche.

But the fact is that regardless of a company’s ultimate motivation, CSR opens an array of opportunities for National Societies.



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2.c

From the Red Cross Red Crescent perspective

In previous paragraphs we have tried to understand why companies might be willing to enter into a partnership agreement with non-profit organisations.

Now it is time to understand why the **Red Cross Red Crescent** might consider entering into a partnership with a company. The fundamental questions to answer are: What does the Red Cross Red Crescent need? What is it looking for? What would motivate a National Society to enter into this kind of agreement?

Of course, one of the main reasons to find corporate partnerships is the need to diversify the funding sources. But that's not the only reason. National Societies might have many other reasons that would have to do with:

-● The organisation's values
-● The search and need for innovation
-● The need for general or unrestricted funds
-● Internal capacity building
-● Pursuing and finalising existing programmes
-● Expanding the programme area, developing new projects
-● Developing new work areas
-● Generating reserves that ensure an income flow for the future
-● The strong desire to get more companies involved in social welfare activities which are a key part of the economic system and also partly responsible for the future of our planet
-● Gaining visibility and improving an image

Regardless of the partnership's original motivation the ultimate objective is to achieve a long-term association that might not only bring financial, in kind or image benefits but also influence the company's strategy towards society.

The current trend at National Societies, that are successfully developing corporate partnerships, is to focus on companies that have a true sense of integration to the Red Cross Red Crescent cause and traditions; partners that think in the same way and whose work has the most contact areas with the National Society's mission. Whenever possible, they seek to associate with companies who have an honest commitment to the society they live in and who are less interested in a brand recognition strategy.

2.d

Trend: the company and the organisation as true and lasting partners

Some companies might enter partnerships for marketing reasons and others from the CSR perspective, but recently there has been a trend where companies and non-profit organisations relate to each other in a closer, equalitarian and integrated way and the relationship is transformed into:

- **True partners and not beneficiaries:** it is no longer what the company can do for the organisation but what they can do WITH the organisation.
- **Co-responsibility in the social transformation process:** the company takes responsibilities for the communities and projects, it is not just a regular donor or ally.
- **Participatory diagnosis:** the process is guided by participation and involvement of all the players, compared to unilateral decisions of intervention (for example in the selection of projects to be developed).
- **Creativity vs. traditional approach:** innovative alternatives which would allow the flow of knowledge, human resources and technology. It is not just about developing a regular budget for a project but looking at new ways of integrating resources.

How does the relationship between a company and a National Society change according to this trend?

- 1 In the past, companies gave away money and organisations had to just ask for it. Now the company demands impact and organisations must show results.
- 2 The focus is no longer on the developed programme activities per se but on the final outcomes that are generated.
- 3 Many companies have an area of CSR, institutional relations or even their own foundation. People there might have already shifted and speak the language that non profits do, but they will not have large budgets (compared to the marketing and/or advertising budgets).

IMPORTANT:

- Non profit organisations should be aware that their corporate allies are systematically evaluated according to their results, hence they need to trust the National Society in order to achieve those objectives.

TIP Ask your corporate partner what kind of information or report they need from your National Society and in what format and how often they would like to receive it?

A special case

The alliance between the Spanish Red Cross and the Vodafone Spanish Foundation is a case of: enterprise + NS = "partners". The relationship between both the company and the National Society is so tight and comprehensive that it has evolved to the creation of a joint organisation: the Foundation for Social Technologies (TECSOS, *Fundación de Tecnologías Sociales*). The foundation's goal is to address social needs and to improve the living conditions of underprivileged people and groups through the application of new information and communication technologies. Today, approximately 5.000 companies collaborate with the foundation employing underprivileged groups all over the country.

Cruz Roja Española



Introduce un término

inicio

proyectos

dispositivos

documentos

noticias

contacto

e-informa

La Fundación



La Fundación Tecnologías Sociales – TECSOS, se funda en el año 2002, a través del impulso conjunto de la Cruz Roja Española y la Fundación Vodafone España.

En la Fundación Tecnos se unen la experiencia social de Cruz Roja Española con la excelencia tecnológica de la Fundación Vodafone España, con el objeto de resolver necesidades sociales y de mejorar las condiciones de vida de las personas y grupos socialmente desfavorecidos, mediante la aplicación de las nuevas tecnologías de la información y comunicación, especialmente las móviles, y su desarrollo y utilización.

La Fundación TECSOS Promueve y realiza actividades de investigación, asistencia, prevención, formación, concienciación y colaboración.

NOTICIAS DESTACADAS

15/03/2010
LA FUNDACIÓN TECSOS TAMBIÉN EN FACEBOOK
 Hazte Fan y síguenos en esta red social
[MÁS...](#)

01/03/2010
PROYECTO TELPES EN EL MOBILE WORLD CONGRESS
 Del 15 al 18 de febrero de 2010 en Barcelona
[MÁS...](#)

14/01/2010
ESTRENAMOS EL CANAL DE VÍDEOS DE LA FUNDACIÓN TECSOS EN YOUTUBE
 Ampliamos nuestra presencia en internet a través de esta red Social
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14/01/2010
IV JORNADAS NACIONALES SOBRE VIOLENCIA DE GÉNERO
 1, 2 y 3 de diciembre de 2009 en Huelva
[MÁS...](#)

19/10/2009
EL ENVEJECIMIENTO ACTIVO Y LA SOLIDARIDAD INTERGENERACIONAL

Chapter 3

Types of partnerships

One of the KEY points for successful corporate partnerships is the ability to introduce good ideas. Often companies are unaware of the possible range of partnerships that can be had with an organisation. This chapter lists and describes a number of possible types of partnerships. The classification we provide is not exhaustive but merely indicative. It is important to note that in many cases an alliance can be composed of different activities: promotions, sponsorships, programme for customers, employees, etc.

.....

3.a Communication and information partnerships

3.b In kind partnerships

3.c Fundraising partnerships

3.d Partnerships that involve employees

3

Types of partnerships

Chapter 3

3.a Communication and information partnerships

One of the key points for successful corporate partnerships is the ability to introduce good ideas. Often companies are unaware of the possible range of partnerships that can be had with an organisation. This chapter lists and describes a number of possible types of partnerships. The classification we provide is not exhaustive but merely indicative.

It is important to note that in many cases an alliance can be composed of different activities: promotions, sponsorships, programme for customers, employees, etc.

This might happen through:

-• Activities at the company's selling points: giving away brochures, etc.
-• Production of communication materials.
-• Production of TV educational programmes.
-• Production and airing of mass media advocacy campaigns.

The company should finance the materials and pay the production costs of any campaigns, and they should use their investments in advertising to promote it.

National Societies developing these partnerships will be able to:

-• Achieve visibility,
-• Cover production costs of communication campaigns that could be hard to achieve otherwise,
-• Promote specific messages about medical assistance, prevention, values, concrete actions such as making a donation or selling services.

TIP

With these types of partnerships, the National Society benefits are not financial or goods or services, and they will not generate an economic return but they will increase the visibility and virability (attraction of other companies) of the National Society. They are an excellent starting point for those National Societies starting in the world of corporate partnerships. As the National Society becomes more visible and known it increases its value or "brand equity" and therefore its value for businesses.

Communication partnerships can be developed with any corporate sponsor, but are especially attractive for mass media companies (on and off line), advertising agencies and production companies.

The way into companies is generally through the advertising or marketing area and in the case of media communication, areas of content development, as in this case, the partnership offers something “new” to the media in question.

It not necessary to begin with large partnerships; local National Society campaigns can be thought of as a first step and can partner with local radio stations, cable channels, newspapers or magazines in the area, etc.

TIP For ALL types of partnerships it is essential to exercise control over the use of the name and logo in communications. The logo of our National Society cannot exceed the company’s logo, otherwise the main purpose is lost and vice versa. Therefore, even for this type of partnership, written contracts with clearly specified conditions should be signed.

Mini case studies

- 1 The Costa Rican Red Cross develops communication partnerships to promote issues like accident prevention or raising awareness of the use of fireworks. Corporate sponsors buy commercial space in the mass media, pay for the production costs of the campaign and in return they promote their own brand linked to the Red Cross at the end of the message.
- 2 The Colombian Red Cross develops communication partnerships with a multimedia firm (RCN) which donates the media time for promoting the National Society’s messages, while the advertising agency TWBA creates and produces pro bono TV spots.



3.b In kind partnerships

TIP Do not confuse a donation of assets with a partnership of goods or services. The partnership must comprise of image and media. National Societies usually receive many donations of goods in cases of emergencies. It is important to make the most of such activities and use them as a starting point for a long-term partnership.

In kind partnerships mean that the company will give either relevant products or services to the National Society and its projects. The action is promoted in the media, showing both the company and the National Society logos, the company therefore benefits from the **image association**.

This can happen through:

- The providing of products for the basic development of a program for any community in a state of emergency or disaster, for administrative structures or even for use in an event, raffle, etc. The items can range from things that are needed in times of disaster such as blankets, medicine and clothing to other products or general office use such as computers, cars and trucks.
- The providing of a service that is a priority for the National Society, where the organisation does not have know-how itself, for example, firms that provide auditing services, market research or image, staff training, among others.

Here again the company is responsible for paying the production costs of campaigns and uses its investment in advertising to promote it, signing jointly.

This type of partnership is also a good start for National Societies that need to begin to walk the path of corporate partnerships and who need to save costs and or reallocate funds for the procurement of services, products, new projects and programs. Again, the National Society increases its visibility and the company is associated with a recognised brand in a POSITIVE way.

This in-kind partnership type is ideal when working with small and medium size companies.

Mini case studies



- 1 The Spanish Red Cross and Accenture have a strategic partnership where the enterprise collaborates developing consultancy projects pro bono for the National Society and in return benefits from the promotion of the alliance in the media.
- 2 Microsoft develops partnerships with several National Societies by exchanging software for image promotion. For example, the Argentine Red Cross received 916 software licences to equip its branches, nursery schools and paramedic specialities. The Costa Rican National Society, received software licenses that helped with the implementation of a technological redevelopment project.



3.c Fundraising partnerships

1 Sponsorships: general funds or specific projects

Sponsorship partnerships enable National Societies to raise either unrestrictive funds or specific projects funds, while the company benefits in its image. The company becomes a sponsor or promoter of a project or of the overall organisation, and both parts promote the partnership together.

Definition of the Movement*

Sponsorships:

According to the Movement sponsorships mean relationships in which a company gives financial support to a component of the Movement for a specific event, programme or project and in return expects public association of image. These are considered to be short term, event specific relationships.



© Trinidad & Tobago Red Cross

* According to the International Federation of the Red Cross Red Crescent Societies Policy for Corporate Sector Partnerships.

-• In this type of partnership the income is agreed in advance, and is usually a fixed amount per year.
-• The company may choose to work with either a specific project or with all of the programmes. For this, the National Society should have presentation materials that show the variety of programmes.
-• Generally the activities are grouped together under an umbrella concept of communication that is repeated. Eg.: xx company works with the projects of the National Society and in a particular country.
-• This type of partnership is more feasible with companies that provide intangible services with standardized benefits, such as credit cards, social work, banking.

Moments of crisis undermine these initiatives, as companies shorten their medium and long term vision.

TIP If the partnership is for a specific project then it is essential to keep accounts clear for that project and not allow the allocated money to be diverted for other uses. Transparency is fundamental in the relationship to build trust and it is an important principle followed by the Movement. In general, companies need results and progress reports, which is something programme managers are not generally used to. It is therefore important to determine in advance what type of data you will need to take into account and have it to hand when delivering reports.

TIP When writing a proposal remember to take into account issues like the inflation index and exchange rates when thinking of the value of the project. It is advisable to include clauses that enable to adjust a value if the project is long term.

Mini case studies

1 The British Red Cross and GlaxoSmithKline have developed a project sponsorship partnership where the enterprise supports young people in Scotland with physical disabilities. GlaxoSmithKline has donated £245,000 to support the deployment of a specialist emergency response unit to help people affected by the cholera outbreak in Zimbabwe.

BritishRedCross



2 The Trinidad & Tobago Red Cross keeps a partnership with REPSOL, where the enterprise gives funds exclusively to HIV/AIDS awareness projects that are being developed by National Society.



THE TRINIDAD & TOBAGO
RED CROSS SOCIETY



2 Cause related marketing (CRM)

In partnerships of **cause-related marketing** it is understood that for a short period of time, the company will promote sales of their products or services, and explain that with every purchase by consumers a share of the marked price is intended for the National Society. Again, the company gains in image and in positioning building from the marketing standpoint. The success of the campaign would depend on a strong promotion campaign with action on a massive scale in retail outlets.

Definition of the Movement*

Cause-related marketing:

Relationships in which a company agrees to donate a specific amount of sales revenue (or an equivalent thereof) from a product, service, or brand, to a component of the Movement in return for the public association of its image with that of the Movement. These relationships are often highly advertised "joint promotions," in which the company persuades the public to buy a product, service, or brand using the Movement component's name and logo.



TIP Negotiate a minimum amount guaranteed for the activity so as to cover the costs for human resources that the organisation would make available for the promotion.

In the context of cause-related marketing, there are activities named co-branding or co-branded. This term is sometimes used to identify cause-related marketing but is also the term used when products are launched with the brand of the organisation and the company at the same time.

TIP It is advisable to set an accountable target for the promotion, it will help to engage the consumer and the media from the beginning of the campaign. For example: x number of immunisations, litres of water bars cereals, etc.

* According to the International Federation of the Red Cross Red Crescent Societies Policy for Corporate Sector Partnerships.

-• This type of partnership makes more sense and has more success when there is some relationship between the product of company and the job or mission of the National Society.
-• The “royalty” that the company pays the organisation to use its name can be a variable amount, a pre agreed fixed amount or a combination of the two.
-• The company invests heavily in mass media advertising campaigns to promote the partnership.
-• The idea is to influence the purchasing decision of consumers: “with your purchase of product x you are helping to “...” or you are working with “...”
-• Often these actions do not generate the “peaks” of sales that the companies expect, but rather a benefit of image. That is why it is advisable to agree on a guaranteed minimum amount for the National Society.
-• The contact area in the company is the marketing department, which has the most direct work dynamic.
-• The selling point of the proposal focuses on profits for the sale and short term image consumers. The focus is not so much on the project as it is linked to a product usually and not the institution.
-• Supermarkets can be a key player in the success of these partnerships, for example if the product has more retail spaces or specifically allocated spaces, separate gondolas, end aisles etc. This may generate a greater impact on sales.



One **risk** of this type of partnership, as well co-branding, is that consumers might take it as a “recommendation” of the product assuming that it is better than another. This kind of message is prohibited for National Societies as outlined in its policies (see chapter 5). It is therefore recommended that the National Society requires the registration of a slogan that says “for the benefit of ...” so as not to be confused with product endorsement.

Definition of the Movement*

Endorse:

This refers to a situation in which the Movement component is seen as “providing a sign of formal and explicit approval of a company’s products, policies or services “. As per Article 23 of the Emblem Regulations, “no confusion must be created in the mind of the public between the companies”.



There are National Societies that require their corporate partners to feature a non-endorsement statement on all partnership-related materials. This is the statement used by the American Red Cross, which clarifies the status of the partnership for the consumer:

“The American Red Cross name and emblem are used with its permission, which in no way constitutes an endorsement, expressed or implied, of any product, service, company, opinion or political position. The American Red Cross logo is a registered trademark owned by the American Red Cross.”

Mini case studies

1 Both the Spanish Red Cross and the British Red Cross develop CRM partnerships with Epson. Epson donates £1 or €1 to the NS for every used laser toner cartridge that businesses send back to them for recycling. The partnership’s goal is to help take the strain off our planet’s resources by recycling laser cartridges. The company also collaborates with other Red Cross projects.

2 Pepsico (Quaker, Tropicana, Gatorade) initiated a short-term cause related marketing program at Walmart stores, raising \$6 million in Aeroplan points to support the ongoing work of the Canadian Red Cross.

Cruz Roja Española

British Red Cross

Canadian Red Cross

* According to the International Federation of the Red Cross Red Crescent Societies Policy for Corporate Sector Partnerships.

3 Licences

In the case of licensing, the company produces products with a Red Cross Red Crescent brand and pays a percentage of sales to the National Society (royalty). Generally, in the case of a pure license, the company is responsible for the production and distribution of the product. The National Society increases brand exposure and raises funds, but it should ensure it exercises strong control (of quality, sales, etc.) as the product bears the brand of the organisation.

TIP The most difficult part of this type of partnership is CONTROL throughout the life cycle of the product.

Licence types

There are many ways to implement these licence agreements, and not all of them lead to a partnership.

1 If the company logo, that of the producer, the party responsible for the distribution or responsible for marketing, is not on the product along with the Red Cross Red Crescent logo, then we describe this as a pure license and not a partnership, because the producer is merely a supplier. The latter case is not what this manual is about but we include the example to show the difference between licences and partnerships.

The Red Cross Red Crescent pays the production cost and sells the finished product. E.g., selling “Red Cross Red Crescent” first aid kits that contain “Red Cross Red Crescent” branded products. In this model, the distribution capacity is limited.

2 In the case of a company logo appearing on a product, or having an agreement for distribution, we describe this as a partnership and all parties benefit. Here it could be that the Red Cross Red Crescent contract the production of a product, and the same supplier or another company do the distribution and marketing and pay a royalty for the sold products. In this case distribution and marketing power is increased, as the companies involved are specialists in the subject.

3 Finally, it's possible to launch a branded product that displays the logo of the Red Cross Red Crescent and either the logo of the producer or the logo of the marketing company or in some cases all of them. The idea of this model is to have lower costs and that the endorsement of the product by both the producer and the Red Cross Red Crescent. This may in fact be a classic case of co-branding.

TIP Although getting started with licences might be difficult, it is important to take a first step with small-scale proposals that could serve as testing experiences.

Important points to consider when making a licence agreement:

As it deals with Red Cross Red Crescent branded products that compete in the market with other commercial products then:

- The National Society must develop a study or carry out market research to assess the nature of the future product's market. This can be done by testing the product on a Red Cross Red Crescent public whether they be employees, volunteers, beneficiaries of courses, companies, etc.
- The product should be good quality, and have a reasonable cost benefit relationship to be profitable. The product must have an attractive design and be up to date.
- The National Society must have the necessary internal structure for such projects (e.g. area specialised in fundraising) with the support of governing bodies.
- Finally, the NS must learn how to think like a company, understanding that the licence is a "business" that should generate profit for the National Society.



4 Special events

The National Society creates events where companies can participate through advertising, ticket purchases, participation in different elements of promotion and marketing where they benefit from brand return.

The event may be a fundraising activity or a medium to communicate a National Society program or an institutional promotional message. In the latter case, the partnership is about communication (see point a) of this chapter).

In this type of activity we emphasize that:

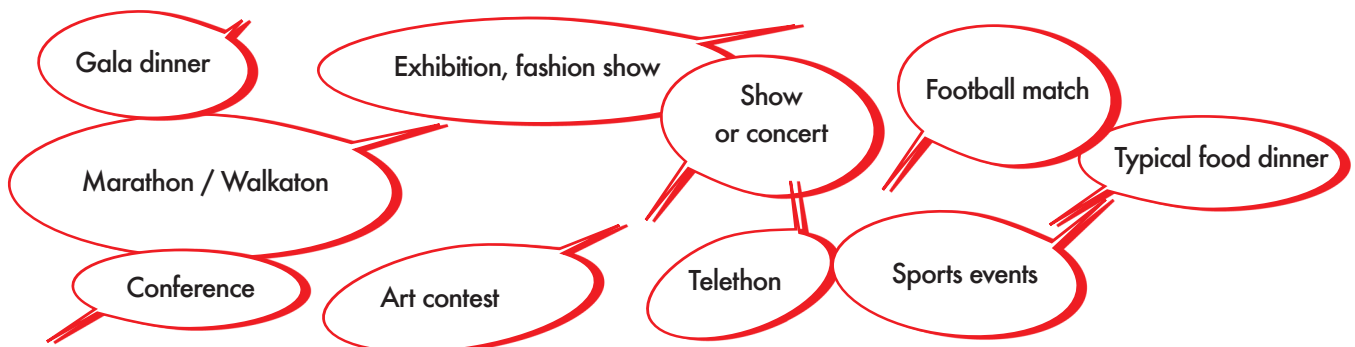
- The National Society must be prepared to deal with the organisation of an event and take into account time and necessary resources.
- Events are a good gateway to future different types of corporate partnerships.
- Generally the advertising area of the company would be the go-between.
- It is very important to list in detail the benefits that a company will be offered, as companies will appreciate this.
- Events are a good tool for financing the National Society operational costs, which means more unrestricted funds.
- Events can combine tangible and intangible benefits for businesses. Among the tangible benefits are: the places where the logo of the company will be, the number of people who will see the brand, other services like free tickets; backstage passes, etc. Among the intangibles benefits are: image and press appearances, among others.

Idea exchange:
 At events organized by third parties, the Red Cross Red Crescent can provide an ambulance service or emergency unit in exchange for a booth on site if this is of interest.



TIP There is no need for a mega event, start with something local and small. The most important thing is to **PLAN AHEAD** and to be capable of covering the expenses with the income raised.

Examples of special events that can be sponsored by corporate partners:



TIP Create a Board or Advisory Committee of businessmen to bring contacts and to open doors. The National Society must be willing to accept “suggestions.”

Mini case studies

1 The Costa Rican Red Cross organises different events with the active collaboration of companies. For example, during the Expo Bike event, the companies helped with the financing of the production costs, and the selling of tickets to the public which generated income for the National Society. Another case is *Expo Seguridad* (Expo Security), where the whole event was organised by the National Society and the income came from selling boots to companies that offered products related to health and safety categories. The fact that, in both cases, the theme of the event was associated with the NS programmes of health or other preventive aspects, facilitated the process as companies working on those issues had a greater natural affinity with the Red Cross Red Crescent brand.

2 The Jamaica Red Cross, like many other National Societies, organises a fundraising gala dinner every year. Funds are raised through the selling to a wide range of companies advertising on the printed programme.

Criz Raja Costarricense



Jamaica Red Cross
We do not discriminate



5 Partnerships where companies channel donations

In these partnerships, the company acts as a platform or bridge for the public (their customers) to make donations to the National Society. In this case, it is not the company that makes the final contribution (for example, rounding off or the purchase of a bond contribution). This type of partnership is not necessarily linked to a specific project, since it is difficult to know how much will be collected. The campaign may therefore be associated with National Society projects in general.

Points to note:

1. Seed money is needed for initial investment (communication materials, systems, staff training); the ideal is to negotiate this with the company.
2. Transparency is key; for example it is not recommended to use the classic collection boxes to raise cash, for large campaigns.
3. The telephone number and website of the National Society should be in all communication materials for any consumers enquiry.
4. Guaranteed minimum amount is generally not negotiated, but the company might decide to give the initial investment.
5. In the case of **ticket round ups**, even when there might be a strong promotional campaign, training of branch managers is key for the motivation of the cashiers in retail outlets. It is therefore very important to inform them about the work of the organisation, the goal of the campaign and the mode of application.
6. **A script for the ask:** the activity is based on the specific request made by sellers or cashiers, which is why the script clear and used by all involved.

TIP Contributions are not given by the companies but from their employees or customers. This should be reflected clearly in the donation receipts so as to avoid a negative impact on the National Society's reputation. (E.g., the company accepts xxx amount on behalf of the Red Cross Red Crescent).

TIP It is useful to establish a financial goal for each branch involved, agreed both by the organisation and the company, or to have a yearly goal, for example exceed \$ xxx

Example options:

a. A contribution coupon:

When a consumer pays for their products at the cashier, a contribution coupon may be offered for purchases to benefit the Red Cross Red Crescent

Would you be interested in buying a contribution coupon for \$x for projects of the Red Cross Red Crescent and taking place in ...

If the client accepts to buy the bond, it must be registered by bar code which they must complete and deposit in a box at the entrance.

b. Rounding off:

When customers pay for their products a window appears on their computer screen that offers them the possibility to round off the entire amount exceeding the ticket. The cashier should ask the client at this time:

Your total is \$5.75. Would you like to donate that \$0.25 to the Red Cross Red Crescent?

- 7.....• The **script** should also involve the handling of objections. The important thing is to give confidence to cashiers providing them with concrete answers.

TIP The ideal average time for this type of promotion is 3 months for an intensive campaign to customers. In the case of “rounding up” it could be longer term.

- 8.....• **Incentive program:** once the alliance ends, it is important to recognise the efforts of the company and its staff, regardless of the amount raised. It is advisable to send reports that reward the best branch, not on the basis of the total or only on the amount of donations on tickets issued. Managers like to be sent photos, articles, etc.
- 9.....• You should know about tax issues, account and order collection, billing, etc.

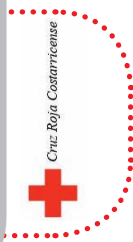
If you prefer that the partnership is linked to a specific objective, then it is also possible that the company does not give money to the National Society but instead gives goods or services. For example, if a National Society needed an ambulance or some high-cost goods then it could develop a partnership to raise funds for its purchase. The campaign ends when it raises the total needed, the company buys the item and gives it to the National Society. If after the time of promotion is has not achieved the necessary funds then it could be agreed that the company pays the difference. In this case, the motivation for the customer is very tangible and they know that their money will go to something specific and concrete.

TIP In some areas or countries this type of partnership is widely used by other organisations, it produces a high financial collection with manageable effort. It would be worthwhile trying this type of partnership to explore other businesses such as pharmacies, maxikioscos, chains of bakeries, among others, and not necessarily only in supermarkets that are the most popular places for collecting. The idea is to look for shops with good flow of revenue and small purchase amounts.

An additional development is to achieve partnerships in which companies actually become allies of the fundraising campaigns of the National Society, either because of sharing databases or because they sponsor fundraising communications.

Mini case studies

- 1** The Chilean Red Cross entered a partnership agreement with the company in charge of the national airports operations. The company facilitates for the National Society the location of collection boxes at strategic corners to allow passengers to donate coins or spare change.
- 2** The Costa Rican Red Cross developed a partnership with Multiplaza Mall, leaving envelopes in all stores for the clients to donate their shopping change. Citibank gave also its support matching the total amount of the purchases done with the bank's credit card. Both companies sponsored the campaign.



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3.d Partnerships that involve employees

1 Corporate volunteers

In this type of partnership the company and the National Society encourage their employees to give part of their time to support the Red Cross Red Crescent and its programmes.

There is a growing trend in companies of employees becoming involved with nonprofit organisations as a strategy to retain them and meet their CSR objectives. For National Societies, corporate volunteering provides an added value not only in terms of time spent, but in quality, knowledge, know-how. The exchange is their time and skills, not money.

Usually companies finance the training courses necessary to do the voluntary activities (especially in the field).

TIP For the National Society to enter a partnership of this kind it must have an organised volunteer programme, with real needs for administrative and field work.

Corporate volunteerism can be a good gateway for future partnerships of various kinds, including the ones with fundraising impact. They are also a great turning point for attracting new individual donors.

Mini case studies



THE TRINIDAD & TOBAGO
RED CROSS SOCIETY

1 The Trinidad and Tobago Red Cross develops annual partnerships with small and medium-sized businesses, such as the case of Courts (Trinidad) Limited. The company supports the National Society with unrestricted funds and it also encourages their employees to participate as volunteers in micro developments.



Norwegian Red Cross

2 The Norwegian Red Cross has a long-term partnership with TINE, Norway's largest dairy company. The company offered its employees the chance to participate as volunteers for the National Society. Out of the 6,000 employees, more than 60 became blood-donors and 10% were recruited as volunteers.

2 Payroll giving

Payroll giving programmes channel the solidarity and social responsibility of the company and its employees in order to generate continuous contributions to the National Society. As in the previous case, the gateway to the enterprise is generally through the area of human resources.

Payroll giving consists of an authorized voluntary contribution being deducted every month from a salary.

Alternative: each employee can be given the opportunity to make a direct donation to the organisation rather than have it deducted from the payroll automatically.

Ideal situation: the company can support the effort of employees by making a similar contribution in return for each contribution made ("matching funds").

Regardless of which alternative is chosen, the programme should be handled as an individual donor programme, where a relationship is cultivated with the individual by providing information on the progress of work in the National Society, etc.

As in the previous case of volunteering, partnerships which involve employees are a great way to:

- unite the employees and the company in a common cause and keep them motivated.
- allow the sharing of a vision of the company on issues of corporate social responsibility to all its employees.

How to implement a payroll giving programme:

- 1 A meeting between the National Society and the employees should be organised where they are introduced to the programme and asked for their donations. The presentation should be as attractive as possible with videos, photos and the presence of the professional in charge of the programme.
- 2 Employees who agree to participate in the programme sign a letter authorizing the company to deduct the chosen amount. This is usually a monthly donation and is calculated as 1% of salary or a fixed amount is calculated according to the salary range.
- 3 After obtaining the employees signed permission, the human resources department can arrange the monthly deduction.
- 4 Each employee is sent a letter of welcome to the programme with the same information as is used in a welcome pack of a single donor.
- 5 Updates are sent regularly to the employees about the progress of the programme and funds to date.

TIP It is important to organise the human resources department to encourage internal communication, including things like programme information on billboards, to motivate employees.

Success factors:

- **The commitment of managers:** there must be a head that will motivate and push the project. The project in turn grows when the company matches the donation, as it is a way to stimulate the project (generally it sets a ceiling).
- **Internal resources:** the company must make all administrative resources available to the project, it is an internal campaign.
- **Previous study:** when selecting a company to offer the payroll discount programme, it is important to know about the activities of their employees, if they have a culture of previous donations.
- **Project:** it has to be an attractive project or programme which the employees can identify with and that they would follow the progress of.
- **Referrals:** it is important to invite employees committed to the cause to meet with other colleagues. This can be through talks or even through making a motivational video about any of the reports with the testimony of that person. This builds team spirit.
- **Volunteers:** it is very likely that a discount programme interacts with the payroll of the company's corporate volunteer programme.

Mini case studies



Canadian Red Cross

1 Petro-Canada provides corporate and employee contributions to Canadian Red Cross in support of our Canadian and International disaster responses. The company's employees have dug deep into their pockets to support National Society relief programmes and Petro-Canada has generously matched these employee donations.



Australian Red Cross
Business Partners

2 The Australian Red Cross promotes to different companies its workplace giving programme. It is a simple yet powerful way for employees to assist Australian Red Cross to deliver services to vulnerable communities through money received from regular payroll deductions.

Some conclusions of this chapter

- + There is a diverse array of ways to partner with companies.
- + In a partnership with a company several types of participation can be covered at once during the course of a relationship, partnerships can evolve from simpler models to models which include more parties and activities.
- + Whatever the type of partnership our National Society wants to develop, it is best that the expenses and costs are covered by the same company. The idea is to have zero cost.
- + National Societies must carefully assess the types of partnerships they are willing to offer companies, since in some forms such as the channeling of donations, it requires a large investment of time and human resources by the National Society.



Chapter 4

Success factors: the power of the Red Cross Red Crescent brand and work

This chapter reviews the importance of having a good brand, as a strategy to recruit new donors and allies. It explores the key concepts and tools used for branding processes. Finally it deals with how to measure branding performance with different target audiences.

- 4.a** The importance of a good brand
- 4.b** Branding tools for success
- 4.c** Brand value and how to introduce it to the prospective partner

Success factors: the power of the Red Cross Red Crescent brand and work

Chapter 4

4.a The importance of a good brand

In recent years, companies have increased their advertising budgets to strengthen their brands and positioning. Civil society organisations also own brands. A large number of NGOs already understand the importance of being easily recognised by their target audiences, and so follow a similar path. A good brand strategy lets them receive donations, develop campaigning activities, and spread messages about changes of practice, conduct, and values in an effective way.

The components of the International Red Cross and Red Crescent Movement are no exception to this trend. Every member organisation of the Movement contributes to the creation of one of the best known brands in the world.

In order to understand what we are talking about, let's see what the brand concept means:

- ⊕ A brand is much more than a logo or a strap-line.
- ⊕ It talks about something that is easily understood.
- ⊕ It communicates one or two ideas.
- ⊕ It appeals to emotions, it is not just rational.
- ⊕ A brand can be positive or negative.
- ⊕ The most powerful brands are the simplest and the most consistent.

A **brand** is a combination of attributes communicated through a name or a symbol that enters the thought-process in the mind of various audiences and influences how they connect to a product, organisation or company, creating value.

Branding processes are strongly anchored into psycho-sociology studies, and they take into account tangible and intangible attributes (functional and emotional) which will be remembered by the target audiences when recalling those brands.

A brand is a **promise** to people that the organisation has certain characteristics, a personality, this should be built on and created from:

- The mission and vision of the organisation and its related programmes.
- The organisation's values.
- The emotional and functional benefits.
- The internal culture.
- The organisation's stakeholders: donors, beneficiaries, participants, employees, volunteers, etc.

"The brand is the distillation of the beliefs of an organisation. It is the external expression of the organisation's internal culture." Anita Roddick, the Body Shop

The process of **branding** means concentrating resources to communicate the organisation's personality through its tangible and intangible attributes, in order to differentiate it from others, attract and motivate the target audiences.

How is a brand expressed? A brand is expressed in a variety of ways:

- Logos, colours, images, celebrities, icons.
- TV, cinema, magazines, posters, radio.
- Websites, web-logs, SMS.
- Word of mouth, reputation, gossip, history.
- How people talk, make business, write their letters, answer the phone, solve problems, hire staff, serves a coffee ...

"Ultimately a brand is the thing people say about you when you are not there". Jeff Bezos, Amazon

Every piece of communication or message issued by a National Society affects or builds the Red Cross Red Crescent brand, from the way the staff answer the phone to a mass media campaign.

It is crucial to fully understand that the Red Cross Red Crescent is a brand, and as such it represents a value that is highly attractive for companies. Brand value is “built” on a daily basis by all the components of the Movement. It will never be enough to insist on the importance of a solid institutional identity. Each time that the emblems of the Red Cross or Red Crescent are seen by a donor or a beneficiary in the media, the brand recognition is enhanced. These are good opportunities to promote our values and principles. Opportunities that should not be wasted!

For this reason, it is important for each National Society to know:

- 1 How to strengthen the brand using the different branding tools.
- 2 The value of their own brand and how to show it to the prospective partner.

The American Red Cross shows their brand value to the corporate partners by making use of the information provided by “Cone”, a consulting firm that publishes every year *The Cone Non-profit Power Brand 100*. The report shows that the American Red Cross is among the top 10 non-profit power brands in the USA. In order to calculate the “value” of a brand the report takes a holistic approach to the study of both financial and brand image factors. The total brand value is driven by three components:

-• **Brand image:** the relative strength of each nonprofit brand’s image derived using a spectrum of measures, using quantitative research.
-• **Revenue:** consolidated yearly itemized revenue, including but not limited to: direct and indirect public support, government contributions and alternative revenue streams.
-• **Propensity for future growth:** Compound annual growth rates, derived from the reported financial data, adjusted to reflect the nonprofit brand’s long-term ability for growth.

4.b Branding tools for success

A brand is then built from the attributes, values, activities and objectives that represent the organisation. Even when National Societies belong to the Movement and the latter develops branding and image standards, each individual National Society should reinforce the brand and brand-value at a local level. There are a number of branding tools that contribute to this:

1 Positioning

Positioning is to create a “position” in the minds of target audiences in a clear and credible way that make us differentiate from others. The main challenge remains in creating a UNIQUE concept about the work of the organisation in the country it’s in or the values that it endorses.

The general public in each country might already have an image of the Red Cross and Red Crescent brand, as they “see” the organisation in the media and the news at local and international levels. But it is the task of each National Society to establish which fundamental concepts are to be highlighted in the work they do locally. In many cases there are National Societies whose historic image is strongly linked to helping people in times of crisis, and whose current challenge is finding how to change that perception to one linked with for instance prevention or development.

One of the most useful tools available to achieve the desired positioning is to use a strap-line, a phrase that summarises the expected new position:

“Away of helping”



“What we carry inside transforms everything”



“The power of humanity”



“Help us to help others”



When a strap-line is used it is advisable to include it in all communication material and throughout a campaign, in order to achieve the expected result with the final image.

Positioning at a country level: the design guidelines or the institutional identity guide issued by the Federation do not define the positioning of any National Society. Moreover, each National Society should define itself at a National level with a positioning concept that best matches its objectives. Most National Societies are positioned as organisations that are working for emergencies and disaster relief.

TIP When a National Society needs to reinforce its image, it can develop information and communication partnerships as a first step, to entering into more complex partnerships in the future.

2 Verbal identity

The verbal identity of a brand is made up of all the following elements:

- The name
- Systems to name the different products, projects, groups, etc.
- The strapline
- The language used
- Tone of voice and vocabulary
- The use of stories, for example

All the items mentioned above should be considered depending on the desired positioning.

The International Federation of the Red Cross and Red Crescent Societies published *A standard style for International Federation English Guide* which can be extremely helpful for anyone working in the communication area.

3 Visual identity

A key tool in the development of any brand is visual identity. It's basically comprised of the graphic components that together provide a system for identifying and representing a brand. Those elements might be:

- Logotypes
- Symbols
- Colours
- Typefaces
- Photos and images

The International Federation of the Red Cross and Red Crescent Societies developed a *institutional identity guide* that aims at providing a professional and unified image of the organisation, specially addressing visual aspects. Using these foundation rules, each National Society should stress the visual elements that best describe their desired positioning.

If for example, a National Society needed to stress the humanitarian aspect of the organisation in the communication materials, it could use pictures that privilege images of staff and volunteers interacting with beneficiaries and showing how they care.

It is advisable that each National Society develops their own guide for their visual identity, in which the use of the logo, the emblem and graphic elements are clearly explained. This document would not only organise work better but would also contribute to the commitment of having integrated communication materials and campaigns with a clear image for all involved audiences. It would also be extremely useful as a guideline for chapters and corporate partners.

A brief reminder about the use of the emblem

The Red Crescent and the Red Cross are two of the most recognised symbols in the world. But they are more than just that. They are protected emblems and their use is enshrined in international humanitarian law. The graphic depiction of either a red cross, red crescent or red crystal, on a white background must be strictly adhered to by all components of the Movement.

Although the Red Cross and Red Crescent emblems are symbols of protection in times of armed conflict, Article 44 of the First Geneva Convention of August 12th 1949, makes the distinction between the protective use and the indicative use of the emblems and outlines the general rules governing by the two uses*.



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1 Protective use - serves as protection markings in armed conflicts.



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2 Indicative use - for indicating that either people or objects showing the emblems are part of the International Red Cross and Red Crescent Movement.

*For a detailed explanation please refer to the *Regulations on the use of the emblem of the Red Cross or the Red Crescent by National Societies (Council of Delegates, Budapest, 1991)* and the *Additional Protocol to the Geneva Conventions of August 1949 relating to the Adoption of an Additional Distinctive Emblem – Protocol III-* (Diplomatic Conference of State Parties to the Geneva Conventions, Geneva, December 8 2005).

4 Communication strategy

As a final note, the brand, as we have said, complies with all the activities of the organisation and especially with its external communications. This is why it is essential that each National Society has a national communication strategy that will help to disseminate their work, raise awareness with the general public about various issues of prevention, encourage action when necessary, and of course, contribute to achieving the positioning desired and creating the image of the National Society in the country it operates.

A good communication strategy should integrate the following:

- +** **Objectives:** there are different types of intended objectives:

 - **Institutional** (what kind of organisation it is, what the organisation is doing);
 - **Prevention** (about a disease, practice, etc.);
 - **Raise awareness** (about a problem, conduct or practice);
 - **Change of conduct or values;**
 - **Call to action** (donate, participate, etc.)
- +** **Audiences:** in most cases, a National Society is speaking to different groups with different interests.
- +** **Messages:** to communicate information according to each objective and audience.
- +** **Media:** selecting the best vehicles to communicate the messages to target audiences, according to the expected responses. It also implies taking into account reply mechanisms as appropriate.
- +** **Time and frequency:** each campaign should be planned with a specific duration in mind. When launching a campaign about a change of “values” for example, the communication campaign should be thought of in years. The opposite happens in a communication campaign with a NOW call to action. Frequency (repeated messages) should also be considered in order to achieve the objective.
- +** **Economic and human resources** in order to develop the strategy (as with any other project!).

Building a good image
takes effort, time
(years!) and resources.

Destroying an image can
happen in seconds.

4.c

Brand value and how to show it to the prospective partner

It takes all of the tools mentioned above, to build the brand in each country. To see how it evolves and how the National Society is perceived, requires market research, both quantitative and qualitative. These methods are widely used by companies to assess their own brands. That is why, in a partnership it is particularly important to show the potential partner image research (perception, brand recognition, comparison with other organizations) in the country where the Society is present, and some data on what the brand is and how it is generated to provide the company with reasons to join and specific information.

Some of the topics covered on an image survey are:

What does the Red Cross Red Crescent brand represent in the country?

What are the values associated with the brand?

Is it well known at local level?

What do people think about the Red Cross Red Crescent?

How is it positioned in regard to other non-profit organisations?



TIP A partnership can be made with an agency or image consultant to carry out research and image studies that are useful when allied with a company. As is the case with Encuestafacil.com, a company that conducts surveys for the Spanish Red Cross pro bono through its website.

Here are some examples of research:

- 1 According to an opinion poll by the consulting firm Unimer Research International, in August 2009, Panama Red Cross, were ranked at third place in the public esteem, just after the Church and the Radio in the country. The press, TV and private companies, came after it. 78.6% of respondents were satisfied with the services provided by the organisation.
- 2 In the case of the Guatemala Red Cross, a similar study by Certeza Consulting (Dec. 2007) showed that the Red Cross brand was the second top of mind brand, but most people did not have recent information about the organisation which led to a distorted image of their work.
- 3 The company *Focaliza* made a market research in March 2007 about the image of the Bolivian Red Cross in that country:
 - 92% of those asked said they knew about the work of the Bolivian Red Cross.
 - The Bolivian Red Cross was associated mainly with the functions of medical assistance (57%), first aid (55%), emergency care (50%) and rescue during disaster (29%).
 - Television was the medium of communication from which 78% of the population heard about the Bolivian Red Cross, 52% Heard via the radio and the press provided the lowest amount with only 26% of mentions.

TIP You can suggest to your corporate ally that it runs its own image surveys, pre and post partnership. Even when within a strategic alliance a company may not see a considerable sales increase, but it should surely bring a positive increase on their image tracking and it is therefore best practice to have that impact quantified.

Use this information when submitting options to companies, it greatly strengthens the case for support, because it's attractive and completely objective and it's something that a company is used to handling.

Chapter 5

Internal policies for corporate partnerships: the yes and no

Corporate partnerships offer a great opportunity to raise funds and to increase awareness of the Red Cross Red Crescent mission and work. They however also represent a risk to the National Society image if the chosen partner is not “the one”. It is very important to avoid conflict of interests and to protect the Movement’s integrity guaranteeing a coherent approach. In the current global environment, a corporate partnership within a country may produce an effect not only on the reputation of the local National Society but also on the reputation of the National Society in another country.

- 5.a** Is there a clear internal policy in the National Society?
- 5.b** Corporate partnerships statutory framework
- 5.c** Selection criteria of corporate partners: the yes or no
- 5.d** Risk zone: what is the limit? Who are the decision-makers? Recommended models

Internal policies for corporate partnerships: the yes and no

Chapter 5

5.a Is there a clear internal policy in the National Society?

Fundraising through corporate partnerships entails some risks. The partnerships create an **image association** to one or more partners, which finally, the organisation does not have 100% control over.

For this reason, the National Society must have clear internal policies for standards and advisable good practices to facilitate the decision-making processes of the National Society government.

The *Policy for Corporate Sector Partnerships* aims to establish a framework for partnerships between companies and components of the International Red Cross and Red Crescent Movement. The Policy is intended to provide “**minimum requirements**” for such corporate partnerships.

However, situations may arise where there is a disagreement about the applicability of the Policy or the appropriateness of a corporate partner. So, the components of the Movement allow for individual responsibility in decision-making, which would rely on the individual’s “best judgement”. In situations where opinions differ widely, the Movement component is encouraged to seek the advice of other Movement components. The Federation Secretariat will support National Societies in applying the Policy.

The importance of signing a partnership contract should not be underestimated. The partnership contract will set out the roles, responsibilities, rights and obligations of each party (see more in chapter 6).

5.b Corporate partnerships statutory framework

The statutory framework encourages partners to enter into relationships in the spirit of **open dialogue** for humanitarian issues. It also requires the Movement components to include a direct or indirect advocacy component in all partnerships.

Components of the Movement should encourage companies to behave in a more socially responsible manner. This is particularly important in the case of companies working to improve their image and relationship with civil society. Where appropriate, the partnership can include assistance and support for the company with the development and implementation of its corporate social responsibility strategy.

It is highly important to bear in mind and understand the statutory framework from which it is derived:

- **Mission:** “to improve the lives of vulnerable people by mobilizing the power of humanity. Vulnerable people are those who are at greatest risk from situations that threaten their survival, or their capacity to live with an acceptable level of social and economic security and human dignity. Often, these are victims of natural disasters, poverty brought about by socio-economic crises, refugees, and victims of health emergencies”.
- **Fundamental principles:** Humanity, Impartiality, Neutrality, Independence, Voluntary Service, Unity, Universality (and what does it mean to the Movement).
- **Mandates of the main components of the Movement:** The International Committee of the Red Cross (ICRC), The International Federation of Red Cross and Red Crescent Societies and all National Red Cross and Red Crescent Societies.

Regulations and Laws governing the use of the Emblem:

The Red Cross and Red Crescent Emblems are protected under international law (1949 Geneva Conventions and 1977 Additional Protocols) and national law, and are first and foremost an internationally recognized symbol of protection during armed conflicts. Each Movement component is responsible for preserving the Emblem's unique protective function.

The 1991 *Regulations on the Use of the Emblem**, adopted both by the Movement and all States party to the 1949 Geneva Conventions, outline the conditions governing the use of the Emblem by National Societies and their members.

In no circumstances can the protective and indicative use of the Emblem be compromised and all agreements with companies must comply with these regulations.



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International Federation
of Red Cross and Red Crescent Societies



*The Regulations on the Use of the Emblem of the Red Cross or the Red Crescent by the National Societies (here referred to as 'Regulations on the Use of the Emblem') were adopted by the 20th Red Cross and Red Crescent International Conference (1965) and revised by the Council of Delegates (1991). In this document, we refer to the revised version from 1991, which was also submitted to and approved by all the States party to the Geneva Conventions and agreed to by the ICRC and the Federation at the 1993 Council of Delegates (Resolution 8).

5.c

Selection criteria of corporate partners: the yes or no

The criteria guiding the components of the Movement when deciding to establish a partnership with a company are as follows:

- The corporate partner must in no way be engaged knowingly or deliberately in activities running counter to:
 - the Movement's objectives and fundamental principles,
 - principles of International Humanitarian Law* and,
 - Internationally recognized standards as embodied in the *Universal Declaration of Human Rights* of 1948, the *Declaration on Fundamental Principles and Rights at Work* of 1998, the *Convention on the Elimination of all Forms of Racial Discrimination* of 1965 and the *Convention on the Elimination of Discrimination against Women* of 1979.

In **situations of armed conflict**, the components of the Movement shall avoid entering into a corporate partnership that undermines the ability of the Movement to operate, which may be the case if one party to the conflict considers the corporate partner's activities as partial and controversial.

Consistent with the Movement's objectives and principles, **no component** of the Movement shall establish a corporate partnership with a company where a material part of its business involves the **manufacture or sale of arms and ammunition**.

* **International Humanitarian Law (IHL)** applies primarily in situations of armed conflict. It refers principally to the four 1949 Geneva Conventions and the two 1977 Additional Protocols. While it must be respected primarily by combatants (State and non-State bearers of weapons involved in the conduct of hostilities), IHL also applies to private companies in cases where they are directly involved in hostilities, for instance, through the hiring of military personnel. To learn more on whether a potential corporate partner has violated IHL, refer to: www.preventconflict.org/portal/economics/portalhome.php

Other activities that may infringe the Movement's objectives and principles include cases where a company:

"...if the possible partner does not satisfy these criteria, the Movement component will not enter into a partnership with it..."

- Has as its core business^{*1} the direct manufacture or sale of products publicly recognized as deleterious to health.
- Through its business practices, materially contributes to armed conflicts or natural disasters.
- Does not respect materially the local or national laws and regulations of the countries where it operates.
- Has major public controversies in the country where the partnership takes place that would undermine the reputation, image or Emblems of the Movement^{*2}.

Desirable profile

All components of the Movement will encourage partnerships with companies that:

- Respect the Movement's humanitarian values and commit to a programme of action to support its work.
- Are leading exhibitors of corporate social responsibility both in policy and practice.
- Would respond positively to the Movement component's input which would be aimed at improving their business practices so as to promote social responsibility.
- Have products and services, which are related to the Movement component's mission or activity; and who would be the best possible partner to help the component to achieve its aims, increase its reach and enhance awareness of its work.
- Are committed to volunteer action.
- Promote the education, health and social welfare of their employees to an extent that goes beyond the legal requirement.
- Promote responsible production and use of their products and services and that adhere to the principles of sustainable development.
- Have a positive image, a good reputation and a track record of good ethical behaviour.

^{*1} There are varying definitions of core business. KLD Research has defined it as 15% of annual revenues for retailers. Michael Jantzi Research Associates Inc. has defined it as 5% of annual revenues from sales.

^{*2} Article 23 (d) of *The Regulations on the Use of the Emblem* states that "the company concerned must in no way be engaged in activities running counter to the Movement's objectives and Principles or which might be regarded by the public as controversial."

The main goal of the components of the Movement when working with the corporate sector is to stand as a **reference organisation** for all companies (large, small and medium-sized businesses, national or international) with regard to concrete actions in aspects of corporate social responsibility.

In the quest for excellence and as an example to companies and society, the components of the Movement should develop and implement their **own corporate social responsibility (CSR) plan** which would address transparency, accountability, good governance, human resources, supplier relationships, ecological and social impact in their own activity

The components of the Movement should then offer companies opportunities to enter into partnerships to not only increase the overall level of contributions and fundraising, but also to **offer them the chance to be socially responsible and to fulfill the objectives of the UN Global Compact.**

According to the Corporate Partnership Policy, National Societies should encourage companies to behave in a more socially responsible manner. This is particularly important for companies working to improve their image and relationship with civil society. Where appropriate, the partnership can include assistance and support for the company with the development and implementation of its corporate social responsibility strategy.



5.d

Risk zone: what is the limit? Who are the decision-makers? Recommended models

As a general rule, the Movement component can consider entering into a partnership with a company unless there are persuasive reasons not to do so. The Policy is intended to provide “minimum requirements” for such corporate partnerships. Components of the Movement are free to make their own more restrictive policy decisions.

It is important though to understand that the decision making of whether or not to enter into a corporate partnership is made exclusively by each National Society, who needs to bear in mind the non-negotiable concepts and recommendations of the Movement. National Societies need to look for balance and base their decisions on possible image and reputation side effects for the Red Cross Red Crescent brand.

- It's imperative that at the time of taking the decision, the National Society is satisfied and convinced about the alliance in question.

It is important, when taking a decision; to have a process that establishes exactly who makes it. As decisions about alliances are relatively sensitive it is advisable that they are not in the hands of one person but that they should be taken by either a consulting group or with external advice.

TIP When it comes to evaluating a company it is important to know if it has developed alliances with other organisations. If this were so then it would be really worth while finding out more about the experience with the other organization through a telephone enquiry. Organisations are usually willing to share this type of information with their equals.

There is more than one way to generate this **process**. After extensive research for this manual we can outline some of the processes:

- 1 In the case of National Societies which are highly developed in the area of resource mobilisation, they have a good number of staff members working in the area and specifically people who are fully dedicated to corporate partnerships. Generally in these cases the people who conduct business with companies depend on the advice of external companies that provide them with information about the reputation and the image of the candidate companies. In these National Societies decisions about alliances are confined to the area of resource development, especially in the handling of companies.
- 2 In other cases the area of resource development and especially the area of companies, evaluate the candidates with or without external help, it is then taken to the executive director for his consideration. In cases like these partnerships are often evaluated by an internal staff committee made up of people from diverse areas that collaborate to prepare a risk assessment with supporting data from the viewpoint of the advantages and disadvantages of the alliance for the National Society
- 3 In third place we find National Societies that involve their governing body in the decision making process. It is the responsibility of the resource mobilization area to present a proposal and to develop the initial evaluation of the company in question either with or without external help.

When governing bodies are involved in these decisions it is advisable that they be given training regarding the advantages and disadvantages of corporate partnerships. This way they may offer the necessary support to help close the negotiation and collaborate in strategic decisions. This will provide the infrastructure for human resources and the necessary investment to ensure the successful development of these alliances.

Regardless of who is in charge of the decision-making process or what the process is, it is important to remember that the response time expected by companies is short. For this reason it is good practice to document the decision-making process including the many various levels of the decision-making. There may be lower level partnerships that do not require the overseeing of a group. The documentation should clarify the area of action for the National Society versus the action of its branches. Some National Societies that work in coordination with their branches succeed in presenting projects to companies that have a national component and a local component, which can be more interesting to a company because of location or a specific community.

This is an example where everyone wins: the company wins, the National Society wins and the branches win.

In short, deciding to enter into a corporate partnership can be complex. There are situations that no manual can contemplate and which can only be resolved using the criteria of the people who have to make the decision. Here are some examples:

- ⊕ *If a company has had a negative work record or a bad image in the past but its present image is improving*, then particular importance must be given to the most recent performance. The past troubles might be mitigated by a more recent commitment in favour of a positive change. The measures taken to overcome the previous negative aspects must be considered, as must the opportunities that the component of the Movement may identify to help with this respect.
- ⊕ *When a National Society wants to establish an association that would imply activities or visibility in a country associated with war*, the proposal must be discussed with and agreed to by the chief of the CICR delegation for that country before a contract is entered into.
- ⊕ *When a business has a dubious image* but is not in the list of companies prohibited by the Movement and there is no objective evidence to justify a refusal then you may take a decision to develop a test alliance in a smaller market or make an alliance with an greater amount than is normal or with reduced benefits given to the image.
- ⊕ *When a company wants to make a promotion with a product* and its image is not 100% akin to the Red Cross Red Crescent brand but the company has other products more in keeping with the alliance, try to alter the negotiation and transfer it to these products or include them in the package.



Chapter 6

Steps to corporate partnerships

In the previous chapters we have defined what a partnership is, and described why making them is important. We have detailed some of the existing types of partnerships, given ideas about policies to follow and emphasized the importance of a good brand. In this chapter we will focus on which steps are needed to implement a successful partnership and what are the characteristics of each. Again, this is just a guide to the most frequent scenarios and is not an exhaustive recommendation.

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- 6.a** Preparation of the requirements and basic forms of participation
 - 6.b** Screening procedure and research
 - 6.c** Ideas generation and proposals creation
 - 6.d** Contact and meeting for proposals presentation
 - 6.e** Negotiation and planning process
 - 6.f** Agreement
 - 6.g** Implementation and monitoring
 - 6.h** Accountability



6

Steps to corporate partnerships

Chapter 6

6.a Preparation of the requirements and basic forms of participation

Before setting out to “find” a corporate partner, it is very important to **be clear about what you want to achieve through a corporate partnership for the National Society**. As with any fundraising activity it is fundamental to:

- + Determine what **needs to** be covered by the National Society, either in terms of funds, services or products.
- + Have a clear **case for support**. If the corporate support will be used for **general funds**, the National Society should explain the key activities in facts and figures.
 - Number of total beneficiaries.
 - Geographical area of work.
 - Main achievements and programmes.
 - Number of volunteers mobilised.
- + Have detailed information including the project’s key objectives, problems to be solved, main activities proposed, time, place, budget, previous achievements, etc, in the case of the corporate support being used for **specific projects**.

This data is provided by the National Society’s area of programmes and services, the executive management or in the case of a National Society with a small staff, by the board. The information required is closely associated with strategic planning exercises that the organisation has carried out and is a key resource for the area of fundraising that will assess which the board type of partnerships is best suited to the current needs.

Once the data is obtained on the funding needs, the National Society can define clear **objectives to raise general or specific funds**, and establish what the best type of partnerships are to address those needs, as well as the feasibility of communication partnerships, goods and services.

-● In the case of general funds, the National Society might plan partnerships that include activities such as sponsorship of the overall organisation, cause-related marketing (% of sales), sponsorship of events, employee programmes, licenses, channelling of donations, amongst others.
-● In the case of specific funds, then the ideal choice is the sponsorship of projects, but activities such as cause-related marketing programmes or channeling of donations or employees may be also very successful if they are linked to a specific project.
-● Communication and information partnerships are a priority in the case of National Societies with low visibility or who are promoting a prevention programme that needs strong support in mass media.
-● In the case of partnerships of exchange of goods or services it would depend on the needs identified and the value of the goods or services exchanged for the brand that the National Society has to offer.

The National Society should also decide which **trade-offs** in partnerships it would be willing to grant companies and clarify the “benefits” in proposals. As discussed above, there are brand trade-offs such as:

-● Insertion of a **company logo** on materials produced by the National Society such as annual reports, prevention materials (brochures, posters), event programmes, promotional materials, website, mass campaigns.
-● Approval for the company to use the logo of the National Society in campaigns that particularly promote the partnership, and in materials such as the company web sites, newsletters, products, etc. as applicable.

The National Society can assess to offer trade-offs for services, for example, the provision of first aid courses for the company concerned, amongst other.

At this stage of the process the question of whether it is a trade-off for brand or for services should be checked and agreed internally, in order to not further promote benefits to the prospect partner that cannot be completed with a total guarantee from the National Society.

The comparative table below reflects the above points:

| Type of partnership | Benefit for the NS | Branding trade-offs | General funds or restricted |
|-----------------------------|---|--|--|
| Communication & information | Access to communicate information and campaigns | The company "signs" the campaign or the materials in question jointly with the NS. | It can be about the work of the NS in general or about a particular project. |
| Goods and services | Access to goods and services | Company logo in communications to be agreed (depends on the value of the alliance: annual report, website, communication materials, etc.). | They may be services that affect the overall work of the NS (audits, software, consulting) or specific goods or services of particular programmes. |
| General sponsorship | Access to funds | Company logo in communications to be agreed (depends on the value of alliance: annual report, website, communication materials, mass media campaigns, etc.). | For general funds. |
| Project sponsorship | Access to funds | Company logo in communications to be agreed (depends on the value of the alliance: annual report, website, communication materials, mass media campaigns, etc.). | For specific funds. |
| Cause related marketing | Access to funds | Logo of the NS in mass media communications, and in points of sale, products. | Commonly this is for general funds, but much more effective when it is for specific projects. |
| Licenses | Access to funds | Red Cross Red Crescent branded products. The company name generally does not appear. | Commonly this is for general funds, but may also be for specific funds. |
| Special events | Access to funds | Company logo in event communication materials, as value of sponsorship. | Commonly this is for general funds, but much more effective when it is for specific projects. |
| Channelling donations | Access to funds and contacts | Logo of the NS in mass media communications, and in points of sale, products that promote donation. | Commonly this is for general funds, but may also be specific. |
| Corporate volunteering | Access to specific time and skilled people | Company logo in communications to be agreed (depends on the value of the alliance: annual report, website, communication materials, etc.). | There may be volunteers for general activities such as fundraising. But volunteers usually assist with specific projects. |
| Employees programmes | Access to funds and contacts | Company logo in communications to be agreed (depends on the value of the alliance: annual report, website, communication materials, etc.). | Commonly this is for general funds, but much more effective when it is for specific projects. |

Finally, in the first step of the process it is key to determine **how to integrate the corporate partnership strategy with the overall fundraising plan** and which team would lead these tasks. The ability to identify and implement corporate partnerships not only depends on the value and image of the National Society in the country in question but also on the professionalism, proactivity and effectiveness of the team that leads it.

Based on the previous comments, the fundraising or resource mobilisation area should determine:

- The objectives to be achieved regarding corporate partnerships: number of companies to contact, desirable amounts and visibility to be achieved.
- The number of people within the National Society to be involved in corporate partnerships activities.
- What real capacity and modus operandi will be in place to follow up on the partnership, in the provision of information and communication materials to the prospect partner, reporting back, etc.
- The modus operandi for working with companies at the local level or subsidiaries vis a vis the work at national level in order to avoid overlapping.

• The **American Red Cross** takes into consideration its chapters when submitting a proposal to a company at national level. The company benefits from the national brand but can also develop local activities with the chapters that can prove attractive for their products or brands. The National Society and the chapters gain with the joint work.

Summary

Basically at this stage, the National Society must:

- Review the needs of general funds and specific programmes. Does the National Society need company support?
- Analyse the types of partnerships best suited to those needs.
- Foresee possible trade-offs according to the nature of the National Society and generate internal agreements.
- Elaborate objectives to be achieved with partnerships and integrate them into the overall fundraising strategy.
- Unite and create a team for corporate partnerships.
- Coordinate the partnership activities with companies led at the national level and those led by their subsidiaries.

6.b Screening procedure and research

At this stage, the National Society must decide on **prospect companies** to formalize a partnership with.

The prospects list could be made from:

-• The personal knowledge and contacts of staff and board members in the corporate world.
-• Recommendations from suppliers connected to the National Society e.g. advertising agencies, direct marketing suppliers, etc.
-• Opportunities detected through the media.
-• Past activities with companies, for example sponsors at special events.
-• Individual donors who have a high rank in a company.
-• People attending Red Cross Red Crescent events and who are working at a company.
-• Opportunities detected at marketing or CSR events organised by third parties.
-• Giving institutions directories.

A 'prospect' company list can be created with all the previous data, and assess and rank, for example, the degree of affinity with the cause of Red Cross and Red Crescent and the degree of feasibility of getting in contact with decision-making people. These assessments can often be numeric, and multiplying both data can establish a priority ranking of candidate companies (companies that obtain the largest number are those most likely to have positive outcomes for the NS). For example:

| Companies | Affinity with the Red Cross Red Crescent (0 to 5) | Contact Feasibility (0 to 5) | Contact priority list (multiplier the two columns) |
|-----------|---|------------------------------|--|
| Company A | Excellent (5) | Very low (1) | 5 |
| Company B | Low (2) | Low (2) | 4 |
| Company C | Medium (3) | Very good (4) | 12 |
| Company D | Very good (4) | Low (2) | 8 |

In this example, Company C would be an excellent candidate to contact, followed by D and then A and finally B.

For this, and taking into account the basic requirements set forth in chapter 5 on policies and desirable companies to contact, it is necessary to collect information to evaluate and select potential candidate companies.

A first filter to take into account is that potential partners should be **consistent** with the guiding criteria and desirable criteria formulated by the Movement.

Also, in the selection of candidate companies, the following fundamental aspects should be considered:

- 1 The mission and vision of the partner.
- 2 The type of products or services offered and their affinity with the Red Cross Red Crescent brand.
- 3 Data of the business of the company: sales volume, number of employees, etc.
- 4 The past "history" of donations or partnerships with other organisations.
- 5 Their "history" on cause related marketing.
- 6 Their CSR policy.
- 7 Issues related to their products or services marketing: branding policies, positioning, promotions, competitors, etc.
- 8 Their stakeholders, reputation and identification of added value to be promoted.
- 9 And any other data that could be considered to give a complete profile of the prospect company.

- When choosing a partner, be clear about their reputation and image, as this can be transferred to the National Society.

The decision as to whether a company complies with the requirements in chapter 5, should be based on the best information from reliable sources available during the course of the screening process, taking into account the period to which that information relates.

Gather information from external sources and from the company itself:

- + **From internal sources:** obtain the company's annual report and accounts and invite the company to submit any information they wish to give relating to the selection criteria and their corporate social responsibility agenda. Image surveys and data from face to face meetings are extremely useful.

• In the event that a company is reluctant to disclose information about itself, you can use a system of "good faith." In this case, although you don't demand that they disclose the information, you ask the company to declare that it conforms to the guiding criteria and will continue conforming to them throughout the contract period in accordance with paragraph 5.3.4 of the *Policy for Corporate Partnerships*. There could also be the signing a confidentiality agreement to facilitate the exchange of information.

- + **From external sources:** according to the *Policy for Corporate Partnerships* of the Movement it is advisable to consult a minimum of three independent, credible sources, which should include, for example:

- General search engines.
- Reputable international and local media.
- Credible and relevant NGOs.
- Corporate chambers.
- CSR organisations.
- It is recommended that Movement components also seek the advice of professional, independent, specialized rating agencies, advised by the Federation and the ICRC (see Appendix IV of the Policy).

- + In applicable cases, information or references can be requested from other National Societies that are already allied with the candidate company.
- + For **multinational partnerships** at this stage the Movement component researching the partnership must inform any other potential stakeholders within the Movement.

All information obtained can be recorded on a **business evaluation form** (see model in appendix A).

This file, with the recommendation of the people in charge of corporate partnerships or fundraising at the National Society can be used as a document to establish the internal acceptance of the company as a candidate for the National Society. At this stage, it is essential that each National Society has, as explained in chapter 5, a **selection process and evaluation of proposals or candidates** that is clear, and details the decision-making levels. The Movement recommends that **the final decision** should be taken by a **senior manager** when uncertainty or disputes persist.

Finally, we should mention that many corporate partnerships are achieved **when companies come spontaneously** to the National Society. Partnerships that begin with an approach of this kind are extremely successful on many occasions, as the company is willing and sure of the benefits of the partnership. However, the National Society must ask for all the above information to make an assessment of the company concerned, and despite this potential partner being available and eager to make a partnership, it is the National Society who should assess the appropriateness of the company according to the required desirable profile.

TIP

Identifying the right partner is a complicated task, therefore it is imperative to take time to do so.

Summary

In this step, the National Society must:

- Determine the companies that are likely candidates for a partnership.
- Reduce the list of candidates by applying the preliminary selection criteria described above and then focus on those shortlisted companies.
- Investigate potential partners, e.g. their business and social responsibility program, if any.

6.c

Ideas generation and proposals creation

According to the internal agreement in step a) with respect to the real needs of the National Society and the internal viability of partnerships, we can then begin to develop comprehensive proposals to submit to companies.

It is advisable to have **generic presentation materials** for companies that describe the different types of participation available to businesses and that may be generally presented. This recommendation is based on the fact that for the first meetings with business there is generally no prior knowledge or previous experience. Generic material allows the exploration of a variety of possibilities and an assessment of the interest of the company, providing an opportunity to hear their specific needs, so as to then formulate specific proposals later. In the event that the company has a greater degree of knowledge or the contact is higher, and you are already aware of certain needs and interests of the prospective partner, then you can go for a more concrete proposal. In many cases, the general presentation is posted on the website of the National Society, which is good for companies who have checked in advance. (More on presentation to companies in chapter 7).

In many cases, National Societies can develop programmes where collaborations or business partnerships are standardized and, for example, have association **categories** that receive different payments and trade-offs and are submitted to all companies equally.

Mini case studies

- 1 The Spanish Red Cross classifies their corporate sponsors into Partner Company, Collaborating Company and Donor Company. Each group receives different benefits and, at the same time involves different levels of giving.
- 2 The British Red Cross has a corporate programme where companies are invited to collaborate with a fixed annual contribution for their Disaster Fund.

 Cruz Roja Española

 BritishRedCross

The ideas included in the initial proposals will depend on the type of alliance chosen. You also need to consider politics and trends of the company, whether they are more likely to sponsor a project or to sponsor an event for example.

The proposals in general must be:

- **Concrete:** with specific activities and easily understood.
- **Added value:** for both the company and the National Society.
- **Measurable:** with a numeric parameter to measure any impact.
- **Relevant:** to the area of the company at which it is directed and the goals it sets.
- **Realistic:** the proposed work should be achievable in the predicted time.
- **Visually attractive:** through the use of photos, images examples and case studies.

A difficult point to define or establish in advance is how much money or what benefits will be derived from the companies. Some parameters to consider when “pricing” a partnership are:

- The impact that the partnership may cause in the target.
- How much the company benefits from joining with the Red Cross Red Crescent brand.
- How much it costs to carry out the project in question + a margin.
- What is the cost of the investment in terms of assets or materials involved + a margin.
- How willing to pay is the company in question (compared with other types of investments).
- How much is being charged by other non-profit organisations at home, etc.

The financial and non-financial contribution agreed with a company can then serve as a value benchmark for future National Society partnerships. As the Society grows in visibility and makes new alliances, so its value in negotiation also begins to grow.

Chapter 7 explains in detail how to create good presentation materials and proposals.

Summary

At this point then, the National Society must:

- Prepare an information package or generic presentation material, which includes information about the National Society and presents the various forms of partnership available including their benefits and trade-offs.
- Where appropriate, when prior knowledge is involved or for certain potential partners with definite needs, there are specific proposals, for which the material must be prepared beforehand.
- Assess the value of the contributions requested by potential partners.



6.d

Contact and meeting for proposals presentation

Having a contact person within a company is very important to the success of the partnership. It is very difficult to achieve good partnerships without a good “gateway” into an enterprise. Moreover, the higher the hierarchical level of the initial contact, the greater the chances of success.

We have talked about this in step b), here we list the ways that you can often get a contact person in a company:

- Personal knowledge of members of the organisation or its governing body and the real possibilities of contact with companies.
- Through advertising agencies, media, promotions or direct marketing agencies.
- Through a contact from the company that has contracted training or first aid course from the Red Cross Red Crescent for its staff.
- In special events organised by the National Society or by third parties.
- Through contact with someone from the same company that is already working with a National Society in another country.
- By recommendation of other companies that have NS partnerships.
- Reviewing the current list of individual donors.
- In cases of specific donations that arise in times of emergencies.
- Through suppliers of the Red Cross Red Crescent.
- Opportunities identified in events related to marketing or CSR.

TIP Advertising agencies, promotion or direct marketing agencies are often a good gateway to companies, as they are already working with them, and are continually looking for a proposal that is unique and original to differentiate their client from its competitors. It is easier to get an appointment with an agency than with a company.

The objective is then to, through a contact, arrange a first meeting with decision makers in the company to whom you can submit ideas and possibilities for partnerships with the National Society. On many occasions, you may contact the company without having a person to “open the door”, simply by contacting the area of CSR or marketing department, and explaining the reason for the meeting. In this case, it is the name and brand of the Red Cross Red Crescent that “opens the door”. But in ALL cases, it is the quality of the proposal and the projects submitted which will interest the company and begin the process of negotiations.

● **Acquiring the first meeting is vital for raising interest and continuing the negotiation process.**

As the National Society becomes more visible and well known, its value or its “brand equity” increases and therefore also its value for businesses. Consequently, companies will probably seek out the National Society.

In many cases companies need a letter or email to be sent to them with a summary of the objectives of the meeting. If this happens, it is important to send the information in a clear, concise manner and to explain to the company the potential benefits of the partnership.

Once the meeting has been arranged, it is key to know who will be attending it, and investigate exactly what they do, what the present challenges of the company are, and if possible their personal interests, etc. to then be able to have an extra conversation topic.

● **As in any face to face meeting with a potential donor it is essential to create a rapport in the first meeting as this is one of the vital ingredients for establishing effective communication with the business. As much as we talk in this manual about the concept of business on the other side there is always a person; and its people who finally give to people.**

At the time of the meeting, the National Society arrives with the materials that have been prepared in advance, and above all tries to show the benefits of a partnership with the National Society, explaining them in more detail and having a positive influence on the company.

Whatever the outcome of the first meeting, it is fundamental to **thank** the people in the company for the time they gave, and keep in touch with them whether it is to continue working on the partnership in question, or simply to inform them about the work National Society in the country.

Summary

At this time the National Society must:

- Evaluate the best way to achieve effective contact with the company that it intends to visit.
- Present the ideas of the association: give a persuasive argument, in a professional, efficient and flexible way.
- Thank them for the company's interest. If it seems there will be a possibility for partnership, take the initiative to schedule a follow-up meeting.



6.e

Negotiation and planning process

At the negotiation stage, the goal is to interact with the related parties to reach a “win-win” agreement that is satisfactory to both partners.

For many, negotiation is an art, and it is certainly vital for achieving good agreements with companies. For this, the following points are important:

- **We are “equal”:** remember that when making PARTNERSHIPS, the organisation and the company are the same, and it is with this thought that the negotiation should be carried out.
- **Listen, and interpret each other’s needs:** often organisations tend to make presentations without asking about or listening to the needs of the company. In a meeting a dialogue should be established which the National Society is also part of it. By asking questions about the company, it is possible to know more about its current situation, its competitors, and its goals. By LISTENING, you can get valuable clues that allow one to reformulate an initial idea and return with a more up to date, relevant proposal for that company.
- **Create a “team” of at least two people:** in the negotiation stage, it is essential to avoid confusion and misunderstandings, so it is recommended that at least two people from the National Society are in contact with the company. This will not only save confusion, but it brings a framework of professionalism and transparency to the meeting.
- **Make GOOD team:** it is important that the “team” in contact with the company functions effectively in that they are coordinated with each other and have a discourse and approach to help the negotiation. On many occasions, someone from programmes should be included in this team; they may be an interesting asset for the company. What is vital is that those involved from the National Society have a common mind and approach.
- **Margin of autonomy:** the team chosen for the National Society should have some autonomy of decision. While probably they will not be able to make the final decision they should have some flexibility to at least be representatives in front of the company.

- **Knowing what is the limit:** as in any negotiation, it should be clear what is NOT negotiable for the National Society, either financially or in terms and conditions that the company may be requesting.
- **Analyse and check internally:** in many negotiations sometimes the company proposes something that looks attractive and/or that the timing of the decision is immediate. Part of the National Society may be tempted to say yes immediately, but it is important to take the minimum time to analyse the entire proposal, and above all to achieve internal approvals. The companies also have their internal processes and are used to consultations, do not hesitate to take a small margin of time to respond without making it into a bureaucratic or slow process, explain to the company that there is a decision making process, the same as serious organisations have.
- **Have an open mind:** often a negotiation starts with an idea, and over time amalgamates the needs of both, the initial idea is changed. An open mind will not only allow flexibility but will generate creative partnerships.

If at any time you reach a **disagreement** on any issue, you should not minimize it but use good negotiating skills, focus on and highlight the points of agreement, while seeking solutions to the conflict.

The important thing is to go to the with a high level of confidence in the attributes of the organisation and the abilities of the people assigned to negotiate.

The negotiation process aims to make a **deal** where the following are evident:

- The National Society shows appreciation of the new partner.
- Indicators of partnership management and transparency from the National Society (accountability).
- The intention to formalize the agreement with a written contract.

At this stage you must also **plan the process** and activities that will be involved in the future partnership. This planning should be done jointly with the company. You should take into account primarily the activities that will need to be carried out, who will be responsible, dates and resources to be involved. The National Society must take into account, and clearly present, what is the structure that they can make available to the partnership, whether it be human resources, financial resources or time. Everything that is planned will then be put into action and should be “tackled”, in short generate results.

The use of tables that list the activities, estimated dates, who are responsible, etc. are extremely useful in the planning process. (See example in appendix B)

In the case that the partnership involves activities with employees of the company, it is essential to work jointly the communication with the company and its employees first, and then the external component.

The **Norwegian Red Cross** explains that planning is fundamental when developing corporate partnerships. They recognize a process where they work with a company in 4 communication stages:



1. Inform
2. Understand
3. Accept
4. Engage

When planning partnerships with companies, the Norwegian National Society works first on providing them with information about their work, get them to understand the values and programmes that are being jointly developed, in order to achieve the acceptance by stakeholders (adoption of the partnership) to evolve into the final commitment.

Following this engagement wheel, the Red Cross tailors the plan of action and communication for each partner TOGETHER with them.

Summary

At this point the National Society should:

- Choose and coach a team to carry out the negotiations.
- Dedicate time to the process, and know that listening can improve the proposals.
- Close the deal with a view to the written agreement.
- Plan the activities involved in the alliance clarifying who will do what.

6.f Agreement

All that was negotiated in the previous section must be contained in the written agreement to give the partnership a clear and transparent framework so as to avoid future confusion. This stage is the moment to formalize the partnership.

One should not underestimate the importance of **signing a partnership agreement** which describes the roles, responsibilities, rights and obligations of each party. It may be a useful guide for the National Society when carrying out their activities within the scope of the partnership. The contract reflects the rights and obligations of both parties in the partnership, which is why they are designed and developed by both parties.

TIP When a contract is being prepared, it should predict in writing all the instances where you may have trouble and should think about possible solutions for these conflicts.

The contract or written agreement should stipulate, in the form of a guideline:

-• The nature and duration of the partnership.
-• The amounts involved or donations.
-• The methods of payment: minimum or variable amounts.
-• Name of the responsible person at the company who is in charge of managing the partnership.
-• A description of other partners involved in the partnership, contractors for example.
-• Clauses about the control of communications.
-• Contemplation of the most likely eventualities.
-• Statement that the company cannot hand over the contract to another person if the company is taken over by another company, or enters into liquidation voluntary or mandatory either in whole or in part, or a receiver is appointed for all or part of their business.
-• In the case of cause-related marketing partnerships or variable sales agreements, you must specify the type of production or sales reports that will be required and a grace period to collect all the proceeds of the sale should be included.
-• In the same way cases of agreements that contain varying amounts depending on sales, clauses should be included that give the National Society the right to request an independent audit of the books of the company with regard to the association. The company will also make available to the consumers full and accurate information on how their purchase will become a donation, including the amount thereof.
-• The contracts may also reflect the type of final report, which the National Society will bring to the company regarding the use of funds.
-• Termination clauses for a breach of the obligations by the company.

Mandatory elements for components of the Movement partnership contracts*

The contract should mention that:

-● All parties to the agreement must be explicitly stated. In particular:
 - The corporate partner signing the agreement must be the entity that is undertaking the roles and responsibilities set out in the agreement.
 - Each Movement component is a separate legal entity and in order to be a party to the agreement must individually sign it.
-● The corporate partner will not infringe the Movement's objectives and principles.
-● Acknowledgement that the use of the Red Cross and Red Crescent names and emblems will conform to Article 23 of the *Regulations on the Use of the Emblem* and control of these will be maintained by the Movement component throughout the agreement with the right to review and amend all communications before use.
-● Termination clauses which allow the Movement component immediate and public withdrawal from the partnership if:
 - The company commits a significant breach of the contract, in particular if it no longer fulfils the guiding criteria.
 - Continued association will bring any component of the Movement into disrepute because of a change in the company's behaviour or public perception of its practices.
-● Acknowledgement that partnership between a Movement component and the company should in no way lead to the belief that the Movement or any of its components endorse the company, its products, policies or services. (See chapter 3).
-● Acknowledgement that no Movement component can grant formal, open-ended 'exclusivity' to any company, or accept limitations on developing partnerships with other companies. In certain instances, granting exclusivity for a specific purpose over a defined period of time may be appropriate within the scope of activities undertaken.

* According to the *Policy for Corporate Sector Partnerships*.

-• Acknowledgement that the Movement component is under no obligation to buy the products, goods or services of the company as a result of the agreement. Any commercial transaction with the company will be subject to a separate agreement.

-• **Exclusivity*:**
a situation in which a Movement component agrees that the corporate partner will be its sole partner for an unspecified period of time.

Summary

At this stage, the National Society must:

-• Prepare a first draft of the contract.
-• Consider the possibility of signing a confidentiality agreement to allow the exchange of information and, if appropriate, to protect an idea of the association.
-• Sign the final contract of association.



* According the Policy for Corporate Sector Partnerships.

6.g Implementation and monitoring

Once the parties have signed the partnership contract, it is time to **put in practice the partnership**.

Businesses require rapid responses, and therefore, the implementation procedures must be conducted with due diligence. In general, it is recommended that there is someone in the National Society who communicates regularly with the company (account executive). In many cases the relationship is also with advertising or promotional agencies and it is essential that if more than one person of the National Society is involved in meetings, then they are all duly informed so as to act efficiently.

Once the process has begun it is necessary to constantly rethink the relationship with the partner, eventually generating improvements and new proposals. It is also essential, to perform an audit of the revenue and to control communications.

One point that must always be clear is that now the National Society and the company are PARTNERS and so they must look after one another in order to ensure that the partnership is successful for everyone.

- Throughout the partnership, the aim is to try to generate a long lasting and solid relationship for both sides, enriching the relationship and sustaining it over time.

Summary

Finally, the National Society should:

- Get the partnership started.
- Follow up the implementation of the contract.

6.h Accountability

As in any relationship with donors, transparency and accountability are the foundation for cultivating the relationship. This is no different in an partnership.

It is very hard to get a good ally, which is why our best scenario is to have this relationship continue and grow over time, so that everyone can prosper. Some National Societies are not accustomed to being accountable, perhaps because of the preconception that a brand like the Red Cross Red Crescent doesn't need to be, but it is fundamental to learn to do so because the demand for transparency is a global demand that the general public makes to all institutions, and even more so, after the recent global crisis. For companies this is even more striking, as they are organisations that are governed by and guided by results, so our National Society must be ready and able to provide adequate reports to suit their partner's needs.

Therefore, beyond the usual information, it is important to know in advance what data our ally will need. In the event that the Society does not have clear **what kind of report**, the company needs, it is fine to ask for help or a model to follow. It is also advisable to ask for models from National Societies already doing this.

• If the benefits offered by the National Society to the company has been primarily image benefits, then it is a good idea to employ or negotiate systematic studies of the image at the end of the partnership. This can be included in the contract and to be paid for by the company.

This shows transparency and creates links and trust between the parties. It is a way to **cultivate the relationship** and open the door to start again.

In the specific case where the alliance has been sponsoring a project, accountability must be more detailed and directed at the objectives to be fulfilled.

TIP in order to produce the report for the company, start from the most general to the most specific data.

Chapter 7

How to create good presentation materials for companies?

When introducing the idea of a partnership to companies, it is fundamental to make a presentation that manages to communicate the relevant aspects effectively. This chapter analyses the different approaches to creating presentations and proposals with regard to format, contents and key arguments to use.

- 7.a** Possible formats
- 7.b** General presentations
- 7.c** Specific proposals
- 7.d** What should be included in a presentation?
Examples of key arguments when writing proposals



How to create good presentation materials for companies?

Chapter 7

Presentation materials are one of the key success factors when negotiating corporate partnerships. As we mentioned earlier, these materials and proposals should not be lengthy but coherent with the overall idea and visually attractive, without looking too “costly”.

As a general rule, a presentation to a prospect partner should show an array of options, stressing the reciprocal benefits that each partner will obtain from the partnership. If a National Society has several types of partnerships to offer, then the first meeting is taken as an opportunity to discover and corroborate which partnership is the most attractive to the potential sponsor, by making a general presentation in order to develop a specific proposal at a future date.

7.a Possible formats

The choice of format is very personal. However, it is advisable to make a printed folder with all the information which can then have added to it, brochures from the program and /or a CD with the presentation, institutional videos, etc.

For ease of use, it is a good idea to have a folder that is a container or a ring binder style folder so pages can be added or removed as needed. The pages must have the Red Cross Red Crescent logo on them and it should be a friendly comfortable design. Tabs can also be used to divide the information

Another option is to create a power point presentation. This should always have a printed version which can be left with the responsible party in the company, since agreements are not usually closed at the time but go through a process of internal decision making and the material will be needed to show to the other decision makers.

7.b General presentations

The information included in a general presentation totally depends on the area of a company that the National Society is in contact with. If for instance, the National Society approaches the **marketing area**, the presentation would need to focus on the brand benefits that the company might receive, rather than a description of the projects that would be developed with the money that is raised.

It's always possible to include extra information about the Red Cross Red Crescent and their programmes at the end of a presentation or to re-direct those interested to the website to learn more about the organisation.

It might also be useful in some cases, to list all the previous partnerships developed by the National Society and/or previous image surveys if available. Proposals and presentations to companies should be designed using **positive language** that talks about the benefits for the company in a partnership with the Red Cross Red Crescent.

Below are some suggestions for the main items to include in a general presentation that would outline the wide array of possibilities for partnerships between a National Society and a company (according to the internal audiences of a company):

| Contents | For marketing areas | For CSR areas / Public relations |
|---|--|--|
| Brief introduction about the organisation. | What it is and brief description of what it does. | What it is and brief description of what it does. |
| Introduction to the way of working with companies. | Explanation of how the National Society considers partnerships, win-win idea. | Explanation of what the National Society understands about partnerships, partners from the common responsibility point of view, public welfare. |
| Why partner with a National Society? | Give good reasons from the marketing perspective (branding, image, prestige, data about impact, audiences, image surveys, etc.). | Give good reasons from the image and distinctive work perspective (branding, prestige, data about achievements in projects, beneficiaries, etc.). |
| Presentation of the possible different types of partnerships. | List the different types of partnerships offered and if possible include examples, showing benefits, counterparts and if applicable costs. In the case of fixed sponsor categories: introduce each category, benefits and costs. | List the different options and especially the projects to be funded, showing benefits to be obtained, counterparts, and if applicable costs. In the case of fixed sponsor categories: introduce each category, benefits and costs. |
| Closing stressing benefits. | With a final list of benefits for both partners. | With a final list of benefits for both partners. |
| For whoever wants to read more... | <ul style="list-style-type: none"> - More about previous partnerships. - Data about the marketing strategy of the National Society. - More about the National Society and its work. - More about the Movement. | <ul style="list-style-type: none"> - More about the National Society and its work. - More about achievements. - More about the Movement. |

It is extremely useful to include quotes from previous corporate partners throughout the presentation.

7.c Specific Proposals

In the case of specific proposals for companies, these should be designed with the audience in mind (to the point, for people with little time, executives), so, short and simple proposals are best (following the English formula “KISS: keep it **short and simple**”). The ideal structure would be an A4 sheet presentation, which is similar to an “executive summary” and the proposal should be made up of about three pages.

.....

7.d What to include in a proposal?

-• Summary sheet, in four paragraphs summarizing the partnership.
-• Project: details of the project and how the company will participate.
-• List of benefits that the company will receive.
-• Cost and nature of the partnership.
-• List of other opportunities for partnerships.
-• Introduction of the organisation.

Example:

Summary Page:

Paragraph 1: Mentions what the partnership is about, general benefits and the cost of the partnership.

Paragraph 2: Indicates what the organisation is, mentions its experience (other sponsors) and who supports the organisation.

Paragraph 3: Points out the flexibility of the proposal, and how to contact the organisation.

Page 1:

Contains a summary (as in the Summary page) which mentions what the partnership is about, what the organisation is, who the other supporters are (different from previous page) and lists all benefits.

Page 2:

Useful data: when, where, how, who, other opportunities, media plan (if applicable).

Page 3:

Tradeoffs, prices and options for participation, thank yous.

Again, the use of the correct language is a key factor. It is not the same to present a proposal to the area of institutional relations, CSR or the foundation of the company as it is to the marketing and sales area. The objectives of each department are different, as is the measurement of success. The former wants first to know more about the National Society's projects for example, while the latter needs more details about the benefits and return on the brand.

.....

Examples of arguments to be used in proposals to companies:

Why partner with the Red Cross Red Crescent?

A partnership with the Red Cross Red Crescent ...

- + Means that the company will be connected with the largest humanitarian network in the world with over 140 years of history, experience and excellent reputation.
- + Offers the opportunity to invest in a better world by helping the poorest and most vulnerable communities in the world.
- + Means partnering with a brand, that according to image and brand surveys in different countries, is positioned not only as one of the most well known brands but also as one of the organisations most readily remembered and named by the general public.
- + Offers a long-term relationship with a trustworthy, apolitical, impartial organisation with global and local presence.
- + Is relating to the community, both at a local level on health issues including prevention and assistance, and at an international level in disasters, first aid, and climate change, among others.
- + Is a connection with one of the few non-profit organisations that can respond in times of disaster as fast as the Red Cross Red Crescent does. Our competitive advantage is based on the fact that we can recruit staff and volunteers at a local level, being generally the first organisation on site. The support of the corporate sector is essential to help us to continue to respond quickly and efficiently in emergency situations.
- + Is a bridge for all your employees, clients and suppliers who want to support the Red Cross Red Crescent work through their on line

To explain the VALUE and IMPACT of the brand and work of the Red Cross Red Crescent add data about:

-• % of brand recognition.
-• Ranking of the brand at national and global scale.
-• Number of active volunteers working.
-• Number of staff members at the National Society.
-• Number of branches in the country.
-• Number of donors in the database.
-• Quantity of beneficiaries in each programme.
-• Number of people who receive the services offered by the organisation (e.g. programmes, first aid courses, etc.).

Companies are interested in this data, as they are potential audiences and customers. It also helps to increase the perceived value of the Red Cross Red Crescent brand as it reaches a large percentage of the population and companies, especially the marketing departments, find this particularly interesting.



Examples of orientational trade-offs to offer (varies by type of partnership and negotiation):

- + Using the name and brand of the National Society in the joint communications of the partnership in question.
- + Inclusion of name and brand of the company in communication materials that the Society produces (brochures, web site dedicated spaces, etc.).
- + Inclusion of name and company logo on products or materials that are distributed to beneficiaries, relevant or parts of the project.
- + Providing training for employees.
- + Presentation of project progress reports and periodic use of funds raised, which are seen as the support of the company making a difference through real stories, photographs and articles in any area you're working.
- + Account Executive dedicated to the company (if justified by the size of the partnership).

For all of this, a long-term partnership with the **Red Cross Red Crescent** will enable the company to (examples):

- Be able to fulfil its corporate social responsibility objectives.
- Have its brand excel in the competitive world of business.
- Increase sales.
- Be able to motivate your staff and to induce social good deeds.
- Have a better relationship with the community.
- Generate more value for its stakeholders.

Chapter 8

Typical challenges and how to overcome them

When developing corporate partnerships, there are moments of success and moments where more complex situations might arise. This chapter explores some of the typical challenges and how to deal with them.



Typical challenges and how to overcome them

Chapter 8

The risks that can arise when companies and National Societies are associated should be carefully analysed and evaluated before making a partnership. But obstacles can also arise during the course of the relationship, often due to cultural and organisational differences between both sectors. The challenges and risks vary depending on which stage the partnership is at: before, during and post “life cycle” of partnerships.

Below are detailed some challenges and myths that may arise and some possible solutions:

1 “Our National Society cannot enter partnerships with companies”

- +** First and foremost, in order to ensure they achieve successful partnerships with companies, National Societies should identify and reconcile any internal policies or practices in the organisation that could be an obstacle to this method of fundraising. In some National Societies there are barriers that come from the internal structure and the Board of Directors, often from lack of experience of the subject or lack of resources.
- +** The fundamental objective is to produce a change in the mindset and try to destroy the myth: “we can not make partnerships with companies”. You should seek ways to convince them about the possibility of allying with the corporate sector and include this mechanism in the fundraising strategy for the National Society.
- +** There are several solutions for this:

 -● Create **training opportunities** about the scope of corporate partnerships in general, including examples of other National Societies and using this manual to ensure that the nature of these activities is understood.
 -● Circulate information between decision makers about cases of other National Societies and their partnerships and/or other organisations involved in partnerships in the country in question.
 -● It is often recommended to form a **partnership committee within the National Society**, whose members have more experience of the business world and relate well to the subject. In this case, the committee may be made up of members of staff and the board, who can choose whether to sanction a partnership or not.

2 The internal structure of the National Society is weak

When we talk about the internal structure of the National Society we mean the resources it has to carry out corporate partnerships. In most cases, a lack of resources means a lack of paid staff that are dedicated to these tasks, or limited capacity of support from either the administration or from the area programs throughout the partnership. Supposing this happens:

- + Start with **simple partnerships** that do not require a great involvement of National Society staff.
- + Develop a **proposal** for financing the area of fundraising that can be submitted to potential donors, probably within the Movement itself, where you can comment on how this investment and seed capital will help the growth of the National Society's work.

3 Choosing the wrong partner

Identifying and choosing the right partner is a very complicated task. Working with one or more partners that are contrary to the expectations and values of the National Society may cause the breakdown of the “marriage”. Therefore, it is essential to conduct a thorough investigation into the potential partner company. The choice of a good partner is the basis of the success of an alliance.



4 When the company says NO

It is highly possible that a company might say no to the Red Cross Red Crescent proposal. The reasons may be different and it is essential to **recognize what NO it is**, since it often means that you could make some other kind of approach or plan in the future. According to Bernard Ross and Clare Segal, authors of *The Influential Fundraiser* there are 9 types NO:

| NO | What it means? | What to do? |
|------------------------------|---|---|
| 1 No, not for this | It means that the suggested project or programme is not attractive to the donor. | Think of new alternatives. |
| 2 No, not you | The person who makes the approach is not appropriate for that donor. (i.e. if the CEO is going to represent the company, then the executive director of the National Society or the president of the board might be best choice). | The right people for the right approach. |
| 3 No, not to me | "I'm not the right person to ask" (might not be from the right area or in the right position for the decision). | Take the proposal to the right area or person. |
| 4 No, not unless... | The conditions proposed do not comply with the company's expectations. | The National Society should evaluate if they can change some of the proposed conditions. |
| 5 No, not this way | The company might have closed their yearly budget and cannot help now, but they might in the future. | Review how and where to do it better. |
| 6 No, not now | It might mean that the approach is not done in the right manner (for example cash), or in the right place. | Come back when the company is planning their next budget, be aware of good timing. |
| 7 No, it's too much | The amount of the proposal is too high. | Adjust the proposal to the level the company can afford to pay and adjust the benefits offered in return. |
| 8 No, it's too little | Some companies might want to have a proposal with larger impact. | Adjust the proposal accordingly bearing in mind whether it is feasible for your National Society. |
| 9 No, go away! | It means NO! The partnership will not happen. | Say thank you and back away. You can always send the company information about the work and activities of the National Society. You never know! |

5 Repentance halfway through

On certain occasions that you may start planning a partnership, which has worked effectively in previous research but at some point in the negotiation a difference emerges and the company or the National Society “repent” the partnership. While the situation is not ideal, it is best not to pursue a partnership with a company where the parties do not feel comfortable from the beginning.

In this case, it is very important to:

- + Stop the process.
- + Work to achieve a good relationship with them regardless of the situation.

6 Decentralization of partnerships between subsidiaries

It often happens that some subsidiaries develop partnerships with companies without the knowledge of the National Society central office or the National Society approaches a company with local influence but no contact with the subsidiary concerned. This creates unnecessary internal tensions.

This is why:

- + It is essential to have some type of policy and process in place that consider how to develop partnerships and how to relate the process to affiliates.
- + Working together is the best solution!

7 Power differences

In many cases, partnerships between non-profit organisations and companies may be affected by imbalances in power. This can easily undermine the partnership and endanger their performance.

Therefore, it is very important to keep in mind that:

- + Partnership is equal with mutual benefits.
- + The parties participants are equal in rights and in obligations.

8 Departure of key personnel

When a key person to the partnership leaves their office, whether by resignation, retirement or promotion, the alliance is weakened and becomes more vulnerable.

It is therefore essential:

- To create networks in the company beyond the actual partnership. The same applies in the case of the departure of key personnel in the National Society.
- The idea is to “institutionalize” the partnership, that is, to create structures and mechanisms that will ensure a long-term commitment.

9 Misallocation of costs and benefits

This is a very important point to consider. The partnership can not generate costs or expenses for the National Society. The benefits can be communication and/or monetary, but partnership should never create a loss.

It is therefore essential to:

- To have good cost planning.
- Have defined what costs each party will assume.

10 Legal risks

This may happen if there are disadvantages when charging the amount stated or if there is a misuse or abuse of the emblem or of the Red Cross Red Crescent logo.

That is why :

- It is always necessary to sign a written agreement providing for such eventualities. The legal issues that arise after breaking an partnership would bring negative consequences for one or both parties involved (including sanctions prestige, time, cost, etc.).

11 Information filters

When sharing with a partner, certain confidential information can be leaked in case the partnership is broken badly, causing serious injury to one or all parties involved.

Therefore:

- the Movement advises to sign a confidentiality agreement.

Chapter 9

Integration

Today organisations are talking more and more about the concept of integration as a more efficient way of working. This chapter explores the relevant aspects to achieve integrated corporate partnerships. You will also find the main conclusions of this manual.

.....

- 9.a** Integration within the National Society
- 9.b** Integration with the external partner
- 9.c** To close and integrate



9 Integration

Chapter 9

All organisations are today talking more and more about the concept of integration as a more efficient way of working.

As seen in this manual, there are fundamental steps in the process of making partnerships and they require internal cooperation within the National Society, as well as an excellent relationship with the partner. In this case integration refers to both integration at the inside of the National Society and integration with the external partner.

9.a Integration within the National Society

- + Integration within the programme area:** the staff employed to develop corporate partnerships should be in contact with the programme area in order to develop appropriate proposals and to access information about results that they could present to the companies involved. If both areas do not work in an integrated manner, the implementation of a partnership is difficult. It is essential to be able to respond quickly to any business concerns
- + Integration within the area of communication:** in corporate partnerships, effective external communication is vital to the success of the partnership. Therefore the communication department of the National Society must be 100% aligned with the process.
- + Integration of the corporate partnerships strategy with the overall resource mobilisation strategy:** corporate partnerships often open doors for other fundraising activities, such as those related to individual donors. Having integrated partnerships in the National Society general fundraising plan can bring extra benefits for the organisation.
- + Integration of subsidiaries:** this can make proposals more attractive to companies by including national and local components, and in turn, generate profits for the subsidiaries.

In short: the work of all areas of the National Society that are involved in the management should be integrated and coordinated to achieve a satisfactory result. To this end, it is advisable to use tools such as: joint planning, ad hoc training, evaluation meetings and exchange, among others.

9.b Integration with the external partner

- + **Cause:** the closer the company's activities are to the cause of the National Society, the more effective the communication will be for both on a day to day basis and the bigger the impact that can be made. For example, companies related to health care, accident prevention, safety, among others, have a greater affinity to the Red Cross Red Crescent "cause" in a partnership.
- + **Values:** the National Society endorses among others, the values promoted by the Movement. When the partner has similar values, it greatly helps negotiation and implementation in the partnership.
- + **Communication:** when the National Society and the company get involved in a partnership, external communications should be integrated. Both parts should communicate the same messages, respecting a common visual identity and integrating these messages with their own promotional messages. (for example on the websites, etc.).

"The best collaborations are those that match the values, strategy and mission of each player. The more collaboration tends to be central to the mission, values and strategy of an organisation the greater the chances of success." (James E. Austin, *The collaboration challenge*. Harvard Business School)



9.c

To close and integrate

● There's definitely no recipe that guarantees the success of a partnership. It requires a lot of time, effort and some investment. But there are some key aspects:

- **Be prepared:** be clear about the National Society's needs, limits and the internal processes involved.
- **Identify the best partner.**
- Think on the basis of **MUTUAL BENEFITS.**
- Be **creative** and have a variety of **ideas** and proposals to offer.
- Reach **agreements** on basic principles.
- Encourage **transparency** and direct and clear communication.
- Have the **flexibility** to solve problems without compromising values.
- Achieve a **commitment** to the objectives of a partnership both externally at the level of the partner and internally for the National Society.
- Define the **resources** that are needed.
- If you find a good partner, take care of them!
- **Cultivate** relationships and be **accountable.**
- Constantly **rethink** the relationship to make it long lasting. ✓

It is true, developing a successful partnership is not an easy task. However, when an alliance works, that is, when it is designed and managed in a systematic way, the benefits can be many. But the most important one is achieving an **effective and positive impact on society in which both partners are working.**

APPENDIX A

Client research template

CLIENT RESEARCH

PRIORITY:

| | |
|------------------------------|--|
| Organisation: | Opportunity category: <i>(high; medium, low)</i> |
| Researched by: <i>(name)</i> | Date created/Updated: <i>(must be dated for each update)</i> |

Contact details:

| | |
|---|--|
| Client contact name (s)/Position: <i>(include community affairs, marketing, sponsorship)</i> | Source: <i>(website, hollis, etc.)</i> |
| Tel: | Email: |
| Website: <i>(list national and international sites)</i> | |
| Fax: | |
| Address: | |
| Other key influencers/Decision makers: <i>(e.g. CEO, chairperson, existing NS contacts, etc.)</i> | |

Charitable giving:

- CSR/Giving policy: *(sources & date of sources must be stated in this section)*

- Policy: *(what is the giving priority and criteria - tick as appropriate)*

| | |
|---|---|
| Education <input type="checkbox"/> | Health <input type="checkbox"/> |
| Disability <input type="checkbox"/> | Environment <input type="checkbox"/> |
| Communications <input type="checkbox"/> | Other <input type="checkbox"/> <i>(pls state)</i> |

- Age groups: *(youth; schools; elderly)*

- Employees: *(what is their level of involvement?)*

- Volunteering: *(is this an area of particular interest?)*

Filename:

Date update:

| |
|--|
| <p>Budgets: <i>(when and how are decisions made; quarterly, annually and by whom)</i></p> |
| <p>Charitable activity within the country during the last 5 years: <i>(name charities and type of activity and how it relates to their policy)</i></p> |
| <p>Marketing sponsorships: <i>(check and list major sponsorships in area of Sports, Arts, TV programs etc)</i></p> |
| <p>Other charities previously worked with:</p> |
| <p>Previous Red Cross activity:</p> <p>National:</p> <p>Regional:</p> <p>Global:</p> |

Filename: _____

Date update: _____

Potential interests with our National Society:

| | | | |
|-------------------------------|--------------------------|-----------------------------|--------------------------|
| International: | | National: | |
| Disaster preparedness | <input type="checkbox"/> | First Aid/safety | <input type="checkbox"/> |
| HIV Aids | <input type="checkbox"/> | Tracing & messaging/refugee | <input type="checkbox"/> |
| Health | <input type="checkbox"/> | Independent living | <input type="checkbox"/> |
| Water & sanitation | <input type="checkbox"/> | Emergency response | <input type="checkbox"/> |
| Other (children & sanitation) | <input type="checkbox"/> | Youth & schools | <input type="checkbox"/> |

Preferred methods of giving:

Communication; Red Cross sponsorship; Employee fundraising; Matched giving;

Project sponsorship; Cause related marketing; Gifts in kind; Volunteering;

High profile events/Networking; Other; (pls state)

Business overview:

Nature of business: *(e.g. wholesale, retail, etc.)*

Parent company & subsidiary structure: *(e.g. holding co, separate & listed operating businesses)*

Historical context: *(e.g. age of company, recent mergers, etc.)*

Financial: *(e.g. annual turnover, profit, include significant products or markets that are helping the business to succeed)*

Filename: _____

Date update: _____

| |
|--|
| Headquarters based: <i>(state country & where is their stock listed)</i> |
| Main locations: World: Continent: Country: <i>(list locations)</i> |
| Number of employees/Location: <i>(profile/age of staff)</i> |
| Key areas of business: <i>(e.g. what do they do/sell and where do they operate)</i> |
| Key objectives/Mission: |
| Key achievements: <i>(refer to annual review include awards, new markets/countries entered, product initiatives, etc.)</i> |
| Products & services: |
| Future products/Launches: |

Filename: _____
Date update: _____



Marketing & communications strategy:

| |
|---|
| Part of group/Affiliated brands: <i>(do they have a brand structure, if so what is it)</i> |
| Brand profiles: <i>(e.g. summarise main brands – check with account owner – it may be appropriate to research some brands individually)</i> |
| Customer profile: <i>(include information on main customer types for different brands or service lines by age, social group etc as appropriate)</i> |
| Critical or peak times of the year for sales activity: <i>(e.g. highlight where there is cyclical demand e.g. Christmas, summer, etc.)</i> |
| Media: <i>(what media do they use to promote their product & services – (e.g. sponsorship, TV or press advertising; PR; etc.)</i> |
| Recent press releases: <i>(highlight major announcements)</i> |

Client marketplace:

| |
|---|
| Main competitors: <i>(list companies & brands as appropriate)</i> |
|---|

Filename: _____

Date update: _____

Charitable policy & activities carried out by their competitors: *(summarise top 3)*

Ethical checks:

(Include sources & date of last ethical review)

Research sources consulted:

Books:

Personnel:

Websites/Searches:

Final comments:

(Summary comments by researcher - their view on the relative potential of this organisation plus highlight any questions that couldn't be answered by desk research)

Filename:
Date update:



Follow up & next steps: (managed by account owner)

Plans:

Actions:

Meeting and conversation log:

| Date | Outcome |
|------|---------|
| | |
| | |
| | |
| | |
| | |

Filename:

Date update:



APPENDIX B

Account plan template

Account Plan Template

| | |
|--|--|
| ORGANISATION: | DATE: |
| Account fundraising target 2010: <i>(in local currency)</i> | Funds raised up to date: |
| Plan reviewed (internally): <i>(with manager or team - date)</i> | Plan agreed by client: <i>date & contact</i> |

Contact details:

| | |
|---|---------|
| Client contact name (s)/Position: <i>(include community affairs, marketing, sponsorship)</i> | Source: |
| Tel: | Email: |
| Website: <i>(List national & international sites)</i> | |
| Fax: | |
| Address: | |
| Other key influencers/Decision makers: <i>(e.g. CEO, chairperson, existing NS contacts & contact details)</i> | |

Filename:

Date updated:

Executive summary: *(summarise key outcomes arising from the plan)*

-
-
-
-
-
-
-

Objectives: *(what is the client aiming to achieve as a result of the charitable relationship. Also ensure that where possible the objectives are specific; measurable; agreed; realistic; timebound. Finally, include any wider National Society objectives - increasing donation level; networking; relationship development; etc.)*

-
-
-
-
-
-
-

Fundraising plan: *(summarise key activities being proposed or planned with the client. Also include resources required such as PR; volunteers; senior support; project visits)*

-
-
-
-
-
-
-

Filename:

Date update:

Include a 12 month view/activity calendar

| Activity/ Timeframe | Jan - Mar | Apr - June | July - Sept | Oct - Dec |
|------------------------|-----------|------------|-------------|-----------|
| | | | | |
| | | | | |
| | | | | |

Ongoing Ideas for following years: *(capture ideas and initiatives that may be discussed/proposed with the client and are not yet part of the formal fundraising plan)*

-
-
-
-
-

Key issues: *(include any barriers/objections to success)*

-
-
-
-

Income & expenditure forecast: *(what is the forecasted income in the account and what expenditure - if any is planned/needed to support)*

| Income | Aumont in local currency | Month | Expenditure | Aumont in local currency | Month |
|-------------|-----------------------------|-------|-------------|-----------------------------|-------|
| Description | | | Description | | |
| Description | | | Description | | |

Filename: _____

Date update: _____

Contact history:

| Contact date | Reason/Update | Outcome/Action |
|--------------|---------------|----------------|
| | | |
| | | |
| | | |

Business overview: *(if already completed research template then can attach in appendix instead)*

| |
|--|
| Nature of business: <i>(e.g. wholesale, retail, etc.)</i> |
| Parent company & subsidiary structure: <i>(e.g. holding co, separate & listed operating businesses)</i> |
| Historical context: <i>(e.g. age of company, recent mergers, etc.)</i> |
| Financial: <i>(e.g. annual turnover, profit, include significant products or markets that are helping the business to succeed)</i> |
| Headquarters based: <i>(state country & where is their stock listed)</i> |
| Main locations: World: Continent: Country: <i>(list locations)</i> |

Filename:

Date updated:

| |
|---|
| <p>Number of employees/Location: <i>(profile/age of staff)</i></p> |
| <p>Key areas of business: <i>(e.g. what do they do/sell and where do they operate)</i></p> |
| <p>Key objectives/Mission:</p> |
| <p>Key achievements: <i>(refer to annual review include awards, new markets/countries entered, product initiatives, etc.)</i></p> |
| <p>Products & services:</p> |
| <p>Future products/Launches:</p> |

Filename: _____

Date update: _____

Giving history to the National Society:

| Year | Amount (local currency) | Fund type | Comments |
|------|-------------------------|-----------|----------|
| 2005 | | | |
| 2006 | | | |
| 2007 | | | |
| 2008 | | | |
| 2009 | | | |

Future opportunities (2011): *(outline potential new opportunities in the account and potential funds available for 2011. State what actions need to take place and by when)*

-
-
-

Appendix:

- *Attach or reference other documents relevant to the client e.g. research; client evaluations/satisfaction.*
- *General and ethical mapping.*
- *Agency contacts.*

Filename:


Date update:

APPENDIX C

Corporate partnerships case studies

| Type of partnership | CRM Partnership where companies channel donations |
|---|--|
| National Society/Company | American Red Cross + Curél |
| Partnership | "Share the gift of caring" |
| <p data-bbox="172 495 323 528">Actions</p> <div data-bbox="161 647 384 725">  </div> <div data-bbox="169 775 371 840">  </div> | <ul style="list-style-type: none"> • Curél Lotion and the American Red Cross have lent a helping hand to those in need during the holiday season through an in store and click-to-give campaign. • In order to help rally people across the country and share the gift of caring, Curél has made a contribution of \$250,000 to the American Red Cross, and has pledged to donate \$10,000 more. • The "Share the Gift of Caring" campaign: people had to log on to www.curel.com and click to donate \$1 of the \$10,000 pledged, in a friend's name. The friend will receive a message from Curél letting him/her know that you care, and he/she will be invited to share the gift of sharing with someone else-creating a chain of donations from the Curél brand on behalf of real people across the United States. Every time Curél customers share the gift of caring, they empower a friend to be a part of the movement by joining Curél in supporting the American Red Cross. |
| Period of time | <ul style="list-style-type: none"> • The company has supported the American Red Cross since 2004. • This was a renewal of a 2007 promotion. |
| Mutual benefits | <ul style="list-style-type: none"> • For the American Red Cross: <ul style="list-style-type: none"> ⊕ The money raised was to: care for disaster victims across the country, support Red Cross efforts abroad, or serve our service men and women. • For the company: <ul style="list-style-type: none"> ⊕ Product promotion. ⊕ Branding. ⊕ Web traffic. ⊕ New contact. |
| Results | <ul style="list-style-type: none"> • 8% lift in product sales from in store advertising. • Celebrity driven media with ad value of \$530,000. • 1,833 click-to-give donations on curel.com in four months. • Curél has made a contribution of \$250,000 to the American Red Cross, and has pledged to donate \$10,000 more. |

Source: Information provided by the American Red Cross and <http://www.redcross.org>

| Type of partnership | In kind Sponsorship: specific project Corporate volunteers |
|--|--|
| <p>National Society/Company</p> <p>Partnership</p> | <p>Australian Red Cross + Vodafone Australia Foundation</p> <p>Disaster Fund</p> |
| <p>Actions</p> <div data-bbox="151 616 438 772">  <p>Australian Red Cross</p> <p>vodafone</p> </div> | <ul style="list-style-type: none"> Following the devastating South East Queensland storms in 2009, the Vodafone Australia Foundation provided Red Cross support for its relief efforts. The support package included 100 water-resistant handsets (valued at around \$20,000) and call credit valued in excess of \$30,000, both of which have helped Red Cross volunteers to stay connected when coordinating logistics in the recovery phase. |
| <p>Period of time</p> | <ul style="list-style-type: none"> 2009 and previous years. |
| <p>Mutual benefits</p> | <ul style="list-style-type: none"> For the Australian Red Cross: The partnership provides funding for three important Red Cross initiatives: <ul style="list-style-type: none"> Red Cross REDiSupport: providing teams of flexible, highly trained emergency services volunteers with advanced skills and technological support. These teams can be deployed to intra or interstate operations in a short period of time. Red Cross MATES: this program trains community volunteers and matches them with individuals who have become isolated due to mental issues. Red Cross Blood Service: 2009 was the Year of the Blood Donor, raising awareness of the ongoing need for Australians to become blood donors. For the company: <ul style="list-style-type: none"> Visibility. Branding. |
| <p>Results</p> | <ul style="list-style-type: none"> The company provided Red Cross with over \$50,000 worth of free products to support relief efforts. The Foundation also made a cash donation of \$10,000 to the Queensland Premier's Disaster Relief Appeal. A team of Vodafone Queensland employees donated their time to become trained Red Cross volunteers and then personally lent a hand to those in need. Over 6,000 homes have already been visited by Red Cross volunteers. |

Type of partnership

CRM
Employee programme
Matching funds
Partnership where companies channel donations

National Society/ Company

British Red Cross + TESCO

Partnership

“Crisis care in your neighbourhood”

Actions



TESCO

- The British Red Cross was the focus for staff fundraising throughout the year and the total they raised benefited from a further 20 per cent ‘top up’ from the Tesco Charity Trust.
- Money was also raised from donations on products sold in store, collection tins at tills, recycling schemes, Clubcard mailings and a Christmas charity single recorded by Katie Melua and the late Eva Cassidy.
- Money was collected by each Tesco store, head office, customer service or distribution centre.

Period of time


- This specific partnership lasted one year (2007). However Tesco and the British Red Cross have been working together to help people affected by disasters and emergencies for over ten years, with the supermarket donating £3.9 million to emergencies.



Mutual benefits

- For the British Red Cross:
 - ⊕ The money raised through the Tesco Charity of the Year partnership is being spent locally on first aid training, emergency equipment and care in the home services right across the UK.
- For the company:
 - ⊕ The partnership enables the company engage its employees in humanitarian activities and in fundraising programmes.


Results


- In 2007 over £4.6 million (approx US\$ 7,5 millions) was raised for British Red Cross services in the UK – the largest amount raised through a single corporate partnership for a charity in just one year, and Tesco’s most successful Charity of the Year partnership ever.

| Type of partnership | In kind Sponsorship: specific projects Partnership where companies channel donations |
|---|---|
| <p>National Society/Company</p> | <p>Canadian Red Cross + Walmart</p> |
| <p>Partnership</p> <p>Actions</p> <div data-bbox="167 616 638 929">  <p>The image shows the logos for the Canadian Red Cross and Walmart. The Canadian Red Cross logo is a red cross on a white background with the text 'Canadian Red Cross' below it. The Walmart logo is the word 'Walmart' in blue with a yellow six-pointed starburst to its right.</p> </div> | <p>Disaster Fund</p> <ul style="list-style-type: none"> The 2009 campaign was expected to raise US\$ 2.5 million. The US\$2.5 million includes US\$1.8 million from in-store donations and US\$630,000 from Walmart Canada matching grants. During the three-week campaign, customers were invited to donate at the cash register to support disaster relief. |
| <p>Period of time</p> | <ul style="list-style-type: none"> This specific partnership took place during 3 weeks in 2009. |
| <p>Mutual benefits</p> | <ul style="list-style-type: none"> For the Canadian Red Cross: <ul style="list-style-type: none"> Money raised during this campaign helped to provide urgently needed relief items during disasters and beyond. Funds raised in communities stayed in the communities to help in times of disaster - from house fires to larger-scale disasters. Walmart's sponsorship helped Canadian Red Cross provide emergency supplies such as blankets, clothing, water and hygiene kits which include toothbrushes, soap and other toiletries. For the company: <ul style="list-style-type: none"> Image and branding benefits. Walmart Canada plays a pivotal role in providing urgently needed relief items during disasters and beyond. |
| <p>Results</p> | <ul style="list-style-type: none"> Since 2003 and including this year's record donation, Walmart Canada, its customers, associates and suppliers have raised and donated more than US\$7 million to the Canadian Red Cross. Walmart Canada remains the Red Cross' largest corporate donor. |

| Type of partnership | Communication In kind Special event Employee programme Partnership where companies channel donations |
|--|--|
| National Society/Company | Colombian Red Cross (Antioquia Chapter) + Several Companies |
| Partnership | Flag Day (<i>Día de la Banderita</i>) |
| <p data-bbox="172 562 320 593">Actions</p> <div data-bbox="172 728 466 779">  Cruz Roja Colombiana </div> <div data-bbox="215 824 440 1041">  </div> | <ul style="list-style-type: none"> • The event goal is to raise funds to level up economically the Chapter activities and specific projects. • Donation options: <ul style="list-style-type: none"> ⊕ Internal collection - solicitation of funds from staff/members within an organisation. ⊕ Street collection - solicitation of funds from the public using Flag Day tins. Tins were located in taxis, restaurants, coffee stores, shopping malls, supermarkets, etc. Face to face fundraising during the Flag Day (done by the "Grey Ladies" - <i>Damas Grises</i>). ⊕ Outright donations - donate in-person at the Red Cross House or by sending a cheque. • Other activities: <ul style="list-style-type: none"> ⊕ Golf tournament. ⊕ Event for volunteers and employees where they have to pay for entrance ticket. • Companies: could participate through the client programme, locating Flag Day tins in their offices and/or by promoting the event. • Media: free pass with media partners. |
| Period of time | <ul style="list-style-type: none"> • 1 day - Annual fundraising event. |
| Mutual benefits | <ul style="list-style-type: none"> • For the Colombian Red Cross: <ul style="list-style-type: none"> ⊕ The amount raised went to the purchase of rescue vehicles to strength the response to rescue activities in the region. ⊕ Branding. ⊕ Community presence. • For the company: <ul style="list-style-type: none"> ⊕ Branding. ⊕ Visibility. |
| Results | <ul style="list-style-type: none"> • More funding than expected: 79% net return profit. |

Source: Power Point presentation provided by the Colombian Red Cross, Antioquia Chapter.

| Type of partnership | In kind |
|---|--|
| <p>National Society/Company</p> | <p>Costa Rican Red Cross + Ritevé</p> |
| <p>Partnership</p> <p>Acciones</p>  | <p>Dengue campaign and Technical vehicle service.</p> <ul style="list-style-type: none"> • Riteve (company dedicated to the technical vehicle service in Costa Rica) finances the technical vehicle service of all Costa Rican Red Cross vehicles. It also recycles old tyres and sells them. The money raised goes to the National Society. • The advertising materials have both logos. |
| <p>Period of time</p> | <ul style="list-style-type: none"> • Annual. |
| <p>Mutual benefits</p> | <ul style="list-style-type: none"> • For the Costa Rican Red Cross: <ul style="list-style-type: none"> + Gets the technical vehicle service. + Gets money for some of the annual projects and activities. + Branding. • For the company: <ul style="list-style-type: none"> + Gets first aid courses for all their employees (approx. 800). + Branding. |
| <p>Results</p> | <ul style="list-style-type: none"> • Partnership value: U\$S60,000 (a % can be used for unrestricted funds). |

| Type of partnership | In kind Sponsorship: specific project Employee programme |
|---|---|
| National Society/Company | Spanish Red Cross + CMR + Several Companies |
| Partnership | Donate your mobile (<i>Doná tu móvil</i>) |
| <p data-bbox="172 510 320 544">Actions</p>  | <ul style="list-style-type: none"> • Partners involved: 1,900 companies and institutions (Mapfre, Sabeco, El Corte Inglés, BBVA, Supermercados Día, Iberia, Accenture, among others) plus 2 more organisations apart from the Spanish Red Cross. • CRM is a company in charge of the distribution, logistics and recycling of mobile phones. • Companies offer their stores as recycling points, so people can leave their mobiles that they don't use anymore. CRM pick them up, classify them into groups: those that can be sold as second hand and those that need to be recycled. |
| Period of time | <ul style="list-style-type: none"> • Annual. |
| Mutual benefits | <ul style="list-style-type: none"> • For the Spanish Red Cross: <ul style="list-style-type: none"> ⊕ Funding to ecological activities and to awareness campaigns. Also for environment education. ⊕ Branding. • For the company: <ul style="list-style-type: none"> ⊕ Branding. ⊕ Visibility as eco-friendly companies. |
| Results | <ul style="list-style-type: none"> • 108,480 mobiles have been donated. • During the last year, the organisations raised €143,686 (the total amount was divided between the 3 NGOs). |

| Type of partnership | In kind Sponsorship: specific project Employee programme |
|--|---|
| National Society/Company | Norwegian Red Cross + DNV |
| Partnership | "Water for life" |
| <p data-bbox="172 499 320 533">Actions</p> <div data-bbox="231 582 590 896" style="border: 1px dashed red; border-radius: 15px; padding: 10px;">  </div> | <ul style="list-style-type: none"> • DNV has contributed to the Norwegian Red Cross work by sharing its IT expertise. • The partnership aims to create pride and enthusiasm among employees worldwide and is expected to increase motivation and involvement. • It is also expected to promote understanding of humanitarian situations in the geographical areas where DNV operates. • The partnership is founded on the exchange of competence. As well as gaining financial support for defined projects, the Red Cross will benefit from DNV's expertise in core areas such as disaster preparedness, risk management and contingency planning. |
| Period of time | <ul style="list-style-type: none"> • The partnership with the Red Cross was established in 2004 following an online vote among DNV's employees. • Ongoing partnership. |
| Mutual benefits | <ul style="list-style-type: none"> • For the Norwegian Red Cross: <ul style="list-style-type: none"> ⊕ Financial support for specific projects. DNV donated money to the Norwegian Red Cross relief operations in the following disaster areas: the December 2004 tsunami; the Katrina hurricane of August 2005; the Pakistan earthquake of October 2005; the bombing of Lebanon in the summer of 2006. ⊕ The Norwegian Red Cross has, with support from DNV, developed know-how and tools to establish water supply to victims of disasters. ⊕ Exchange of competences. • For the company: <ul style="list-style-type: none"> ⊕ The partnership enables the company to profile its CSR in a positive way, internally engaging the employees and externally ensuring a good reputation. ⊕ Exchange of competences. ⊕ Recruitment of volunteers. |

Norwegian Red Cross + DNV


"Water for life"

Results

- DNV has sponsored two drilling rigs and DNV water experts have shared the knowhow needed to drill wells.
- Successful drilling depends on trained Red Cross Red Crescent rig operators with tools and skills in water source identification, water quality monitoring and borehole drilling in sediment and hard rock.
- The wells provide 20,000 people with water.
- Seven wells have been drilled, providing 4,400 people with access to water.
- Employees in Norway gave 1,695 sleeping bags to victims of the 2005 earthquake in Pakistan.
- DNV families were invited to learn more about the Red Cross Red Crescent and practise first aid. 3. First aid training for DNV employees in China.
- Two DNV-sponsored ambulances are in service in Lebanon, operated by the Red Cross Red Crescent.
- In the Serbian capital of Belgrade, DNV has contributed its IT expertise to ensure the sustainable use of IT systems at the ambulance call centre.
- In order to involve employees throughout the global DNV organisation, regional offices have been encouraged to initiate Red Cross Red Crescent projects. DNV Greater China was first out.
- Enthusiastic DNV employees have initiated a range of activities in cooperation with the National Society.

Long-term partnership results:

- In the first three-year period, the partnership funding amounted to NOK 1.5 million per year. These funds were spent on DNV in-kind services as well as on providing financial support to specific programmes.
- For the 2007-2009 period, funds were raised to NOK 2 million per year, divided between in-kind services and financial support.

| Type of partnership | Special event Corporate volunteers |
|--|--|
| <p>National Society/Company</p> | <p>Trinidad and Tobago Red Cross + Citibank</p> |
| <p>Partnership</p> | <p>Annual Red Cross Children's Carnival</p> |
| <p>Actions</p> <div data-bbox="159 582 590 952">  <p>THE TRINIDAD & TOBAGO RED CROSS SOCIETY</p> <p>citi</p> </div> | <ul style="list-style-type: none"> • The annual Red Cross Children's Carnival is a very high profile children's event. • The event involves 30 companies, 200 volunteers and at least 3 other charitable organisations provide support. Citibank has been its main sponsor for 10 years. • There is an ad hoc special Committee. dedicated to the whole event organisation. |
| <p>Period of time</p> | <ul style="list-style-type: none"> • 2 days. The Red Cross have been organising this event for 50 years. |
| <p>Mutual benefits</p> | <ul style="list-style-type: none"> • For the Trinidad and Tobago Red Cross: <ul style="list-style-type: none"> • Funding for recovery disaster projects among other Red Cross initiatives. • For the company: <ul style="list-style-type: none"> • The benefit to the bank is that the government offers a generous tax incentive (150% claim) to companies that contribute to culture, so it is even more attractive. |
| <p>Results</p> | <ul style="list-style-type: none"> • Citibank donated U\$\$60, 000 each year (diamond sponsor). • Ticket value: U\$\$25 (adults) and U\$\$15 (under 12 year old). • Fundraising activities: raffles, among the prizes you can get flight tickets and notebooks. |

Source: Information provided by the Trinidad and Tobago National Society.



The International Federation of Red Cross and Red Crescent Societies promotes the humanitarian activities of National Societies among vulnerable people.

By coordinating international disaster relief and encouraging development support it seeks to prevent and alleviate human suffering.

The International Federation, the National Societies and the International Committee of the Red Cross together constitute the International Red Cross and Red Crescent Movement.