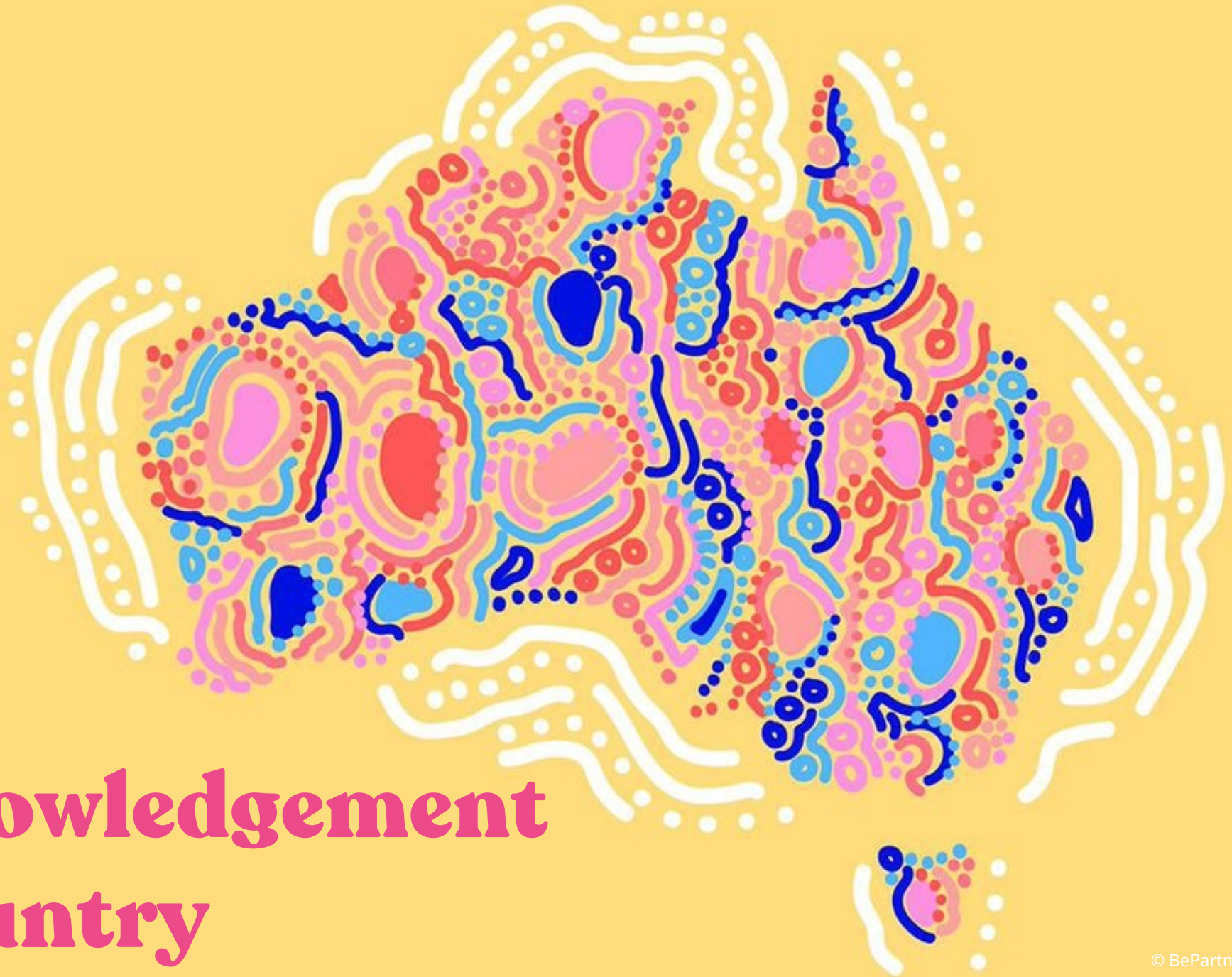


# 7 Steps to Success

## Webinar

26 March 2024





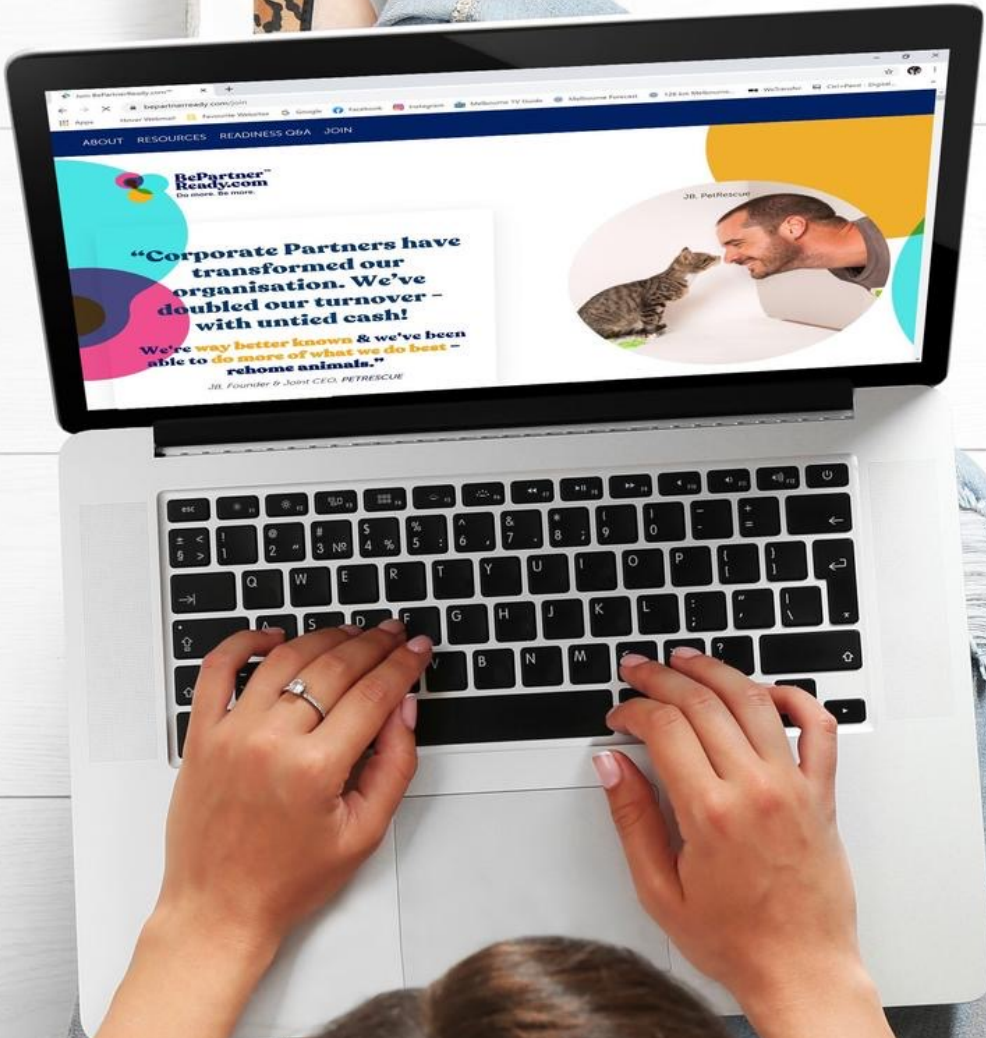
# Acknowledgement of country

**Before we  
begin...  
a bit about  
us**



**BePartner<sup>®</sup>  
Ready.com**

Do more. Be more.





**① 4 purses**

**② Timing**

**③ Cakes &  
muffins**



# 1 The 4 Purses



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Ready.com**  
Do more. Be more.

# The 4 Purses



**1**

**Human Resources  
Purse**



***BEIJER REF***

**New Zealand**



**Conservation  
Volunteers  
New Zealand**



# The 4 Purses



**1**

**Human Resources  
Purse**



**2**

**Philanthropic  
Purse**



Make your dreams  
mean something

Help solve cancer while you sleep!



Garvan Institute  
of Medical Research



Vodafone  
Foundation

# The 4 Purses



**1**

**Human Resources  
Purse**



**2**

**Philanthropic  
Purse**



**3**

**CSR (Corporate Social  
Responsibility) Purse**

## In Partnership

As part of its relationship with Big Brothers Big Sisters, The Walt Disney Company Australia and New Zealand developed the technology that powers OurSpace. Bigs and Littles will have the ability to incorporate Disney and Pixar characters into the actual interface, allowing for tailored and personal experiences and interactions for each relationship.

Collaborating helps build the relationship between Bigs and Littles, OurSpace features games, videos and activities that they can experience together online including cooking, gardening, dancing, creating a science experiment and more.



[Learn more about Disney's work in the community](#)

OURSPACE

Explore infinite possibilities

Login



# CSR Purse

# The 4 Purses



**1**

**Human Resources  
Purse**



**2**

**Philanthropic  
Purse**



**3**

**CSR (Corporate Social  
Responsibility) Purse**



**4**

**Marketing  
Purse**





45g e

Nestlé®  
**KitKat**®

Have a 'break'®

Ask  
**RUOK?**™



ENERGY  
**490kJ**  
6% DI\*

Per 2 Fingers

**Be treatwise®**  
Enjoy a balanced diet

[ruok.org.au](http://ruok.org.au)

**A conversation  
could change a life.**

TEAR  
HERE



Nestlé NZ



**Nestlé**

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**Language is  
important...  
it unlocks  
the purse**



# The Four Purses

Within the Corporate & Business sector we've identified that there are 4 Purses – that is, 4 separate areas/departments where changemakers & non-profits can unlock cash (as well as other awesome things). It's important that you know which purse you're targeting because it's one of the critical success factors in securing corporate partnerships. Once you know which Purse you're targeting, you'll know some crucial

things including: The reason for their investment; the size of the budget; the language used by the purse holder; the time of year that funds are allocated; and their ROI (Return on Investment) measures.

Apply this thinking when approached by corporates also. Simply asking for their job title will reveal **so much**.

Once you know which Purse, you'll be able to ask the right questions, make the approach in the right way and ultimately put forward a proposal that meets their particular needs. It's possible for a large company, Westpac or Wesfarmers for example, to partner with non-profits within each of the Purses.

Here are the 4 purses:



## 1. Human Resources Purse

### Reason for investment

- Staff engagement & volunteering
- Increase pride, loyalty and motivation
- Satisfy demand of Millennials to do good at work
- Build compassionate leadership and teamwork skills
- Support a CSR strategy/contribute to community

### Size of purse

- Typically small, sometimes only costs covered
- Smart charities are charging a fee, or you can offer exclusively to partners & sponsors that are supporting you financially

### Purseholder job title

Head of Human Resources, People & Culture, VP of HR

### Roi Measures

- Increase in staff motivation & pride
- Enhance work-life balance



## 2. Philanthropic Purse

### Reason for investment

- Fulfil on social purpose, make a social impact
- Tax deduction
- Ring-fenced giving (not impacted by company performance)
- Sometimes, due to a personal relationship (or Chairman's Chequebook)
- Sometimes required by Government or Industry to win contracts
- Demonstrating Industry leadership
- Part of their culture / set by Founder / Religious roots

### Size of purse

- Medium, can be fragmented
- Often broken up into lots of small grants, especially if a Foundation

### Purseholder job title

Head of Philanthropy, Head of Foundation, Chief Giving Officer, Community Relations or if a small company it can be HR, CEO, CFO or Corporate Affairs

### Roi Measures



## 3. CSR (Corporate Social Responsibility) Purse

### Reason for investment

- Stakeholder, lobby group & customer pressure
- Desire for more sustainable business
- Solving social problem is advantageous to their business
- Minimise negative impact on environment & community (reduce reputational risk)
- Earn their 'licence to operate'
- Increasingly required by Government or Industry to win contracts
- Demonstrating Industry leadership
- Creating more diversity
- Reduction in wastage = cost savings
- Differentiation in the marketplace

### Size of purse

- Large, complex and growing
- Not all companies are embracing CSR

Those on the journey are investing millions



## 4. Marketing Purse

Brand-aligned partnerships  
Sponsorships  
Cause Related Marketing

### Reason for investment

- Leverage their CSR or sponsorship investment & activity
- Differentiation in the marketplace (products & services)
- Demonstrate social good to customers
- Desire to be famous for a social cause
- Increased sales on product or service
- Reach new markets
- Build trust and brand
- Attract socially conscious millennials as customers & staff
- Demonstrate or sample product (in a sponsorship/event)
- Reposition brand

### Size of purse

- Typically, largest of them all

# ② Timing Is Critical



# 3 Cakes & muffins



# 7 Steps to success

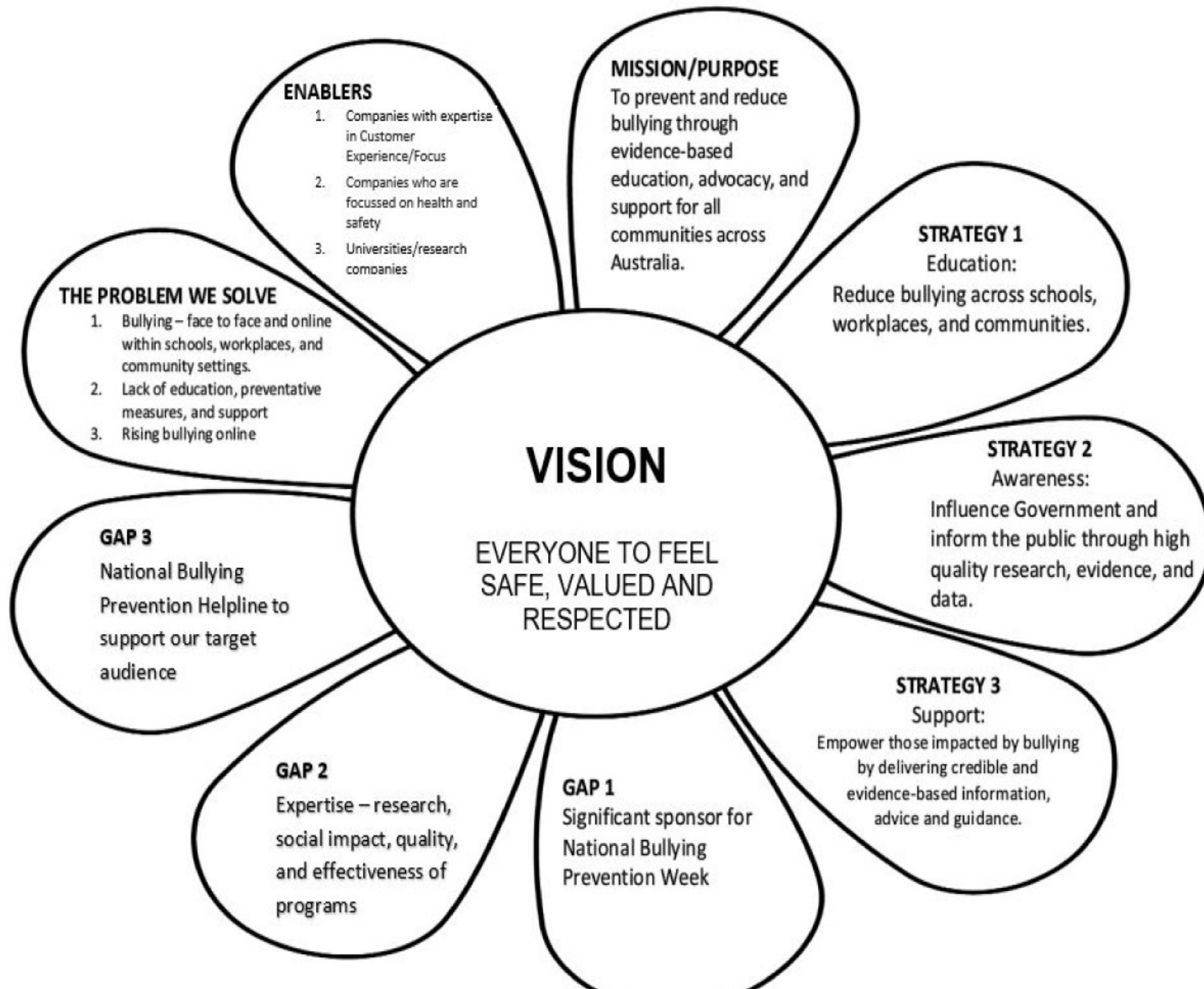


**BePartner<sup>®</sup>  
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**The  
BePartnerReady.com®  
Process**

**Getting started  
Set your Corporate  
Partnerships  
Intention**







# BULLY ZERO Corporate Partnerships INTENTION 2020/21

1

Secure 3 x brand aligned partners to provide untied funding @ \$180,000 pa x 3 years. Secure by June 2022

2

Secure 1 partner for mass market awareness campaigns addressing bullying @ \$200,000 in-kind x 3 years. Secure by May 2023

3

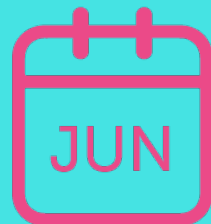
Secure 1 x sponsor for the National Bullying Prevention Hot Line @ \$150,000 a year x 3 years. Secure by June 2023



# 1

## **SWOTA**

Identify your organisational Strengths, Weaknesses, Opportunities & Threats, create Action list to leverage & address them.



# 2

## **Assets Inventory & Valuation**

Compile an Inventory of your organisations' Assets that would appeal to a partner, using our unique Ph formula, place a \$ value on each.



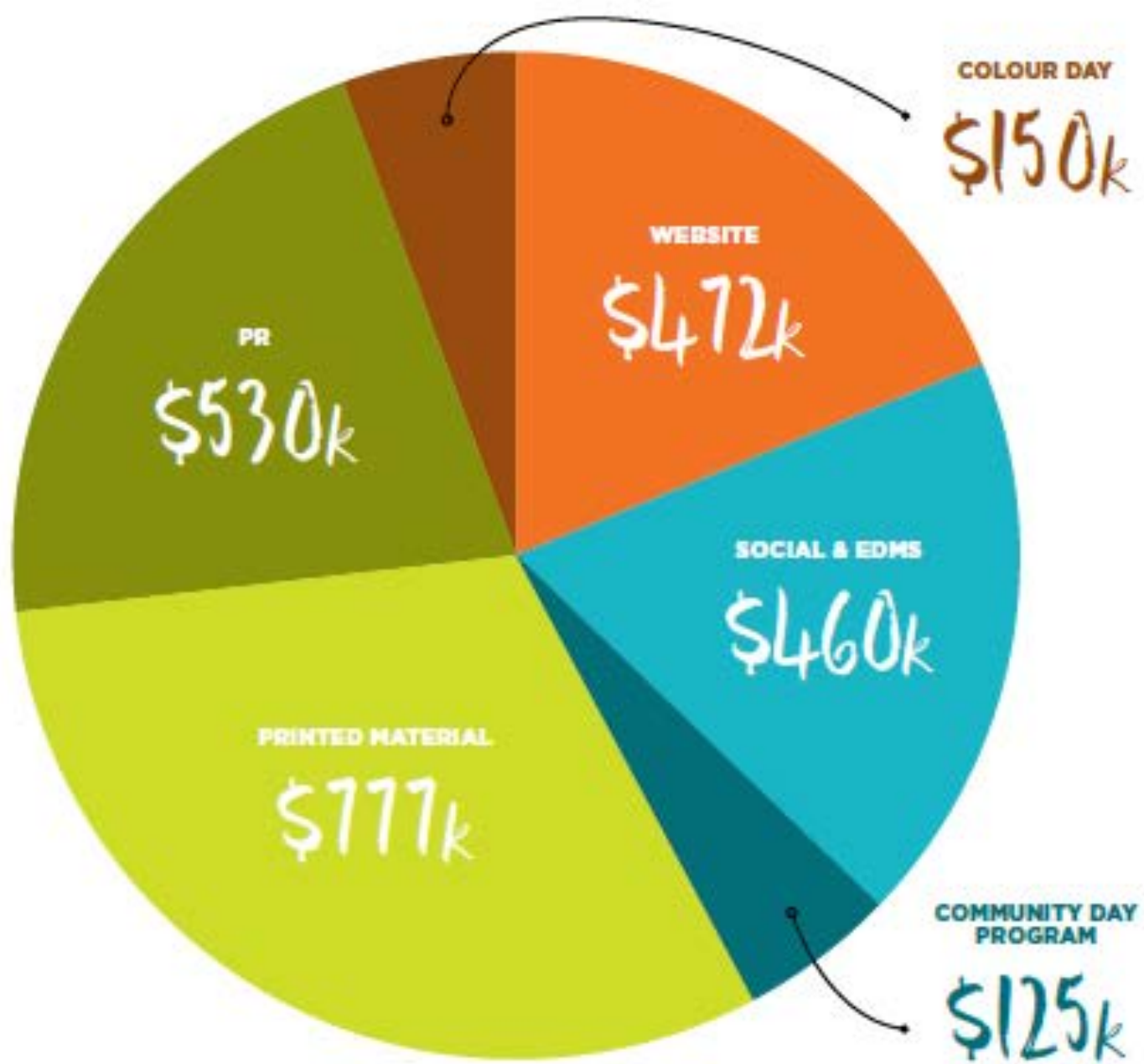
**BePartnerReady.com®**

**Includes:**

**The Ph Formula –  
world first DIY Asset  
valuation**



# VALUE OF BRANDABLE ASSETS \$2.5M



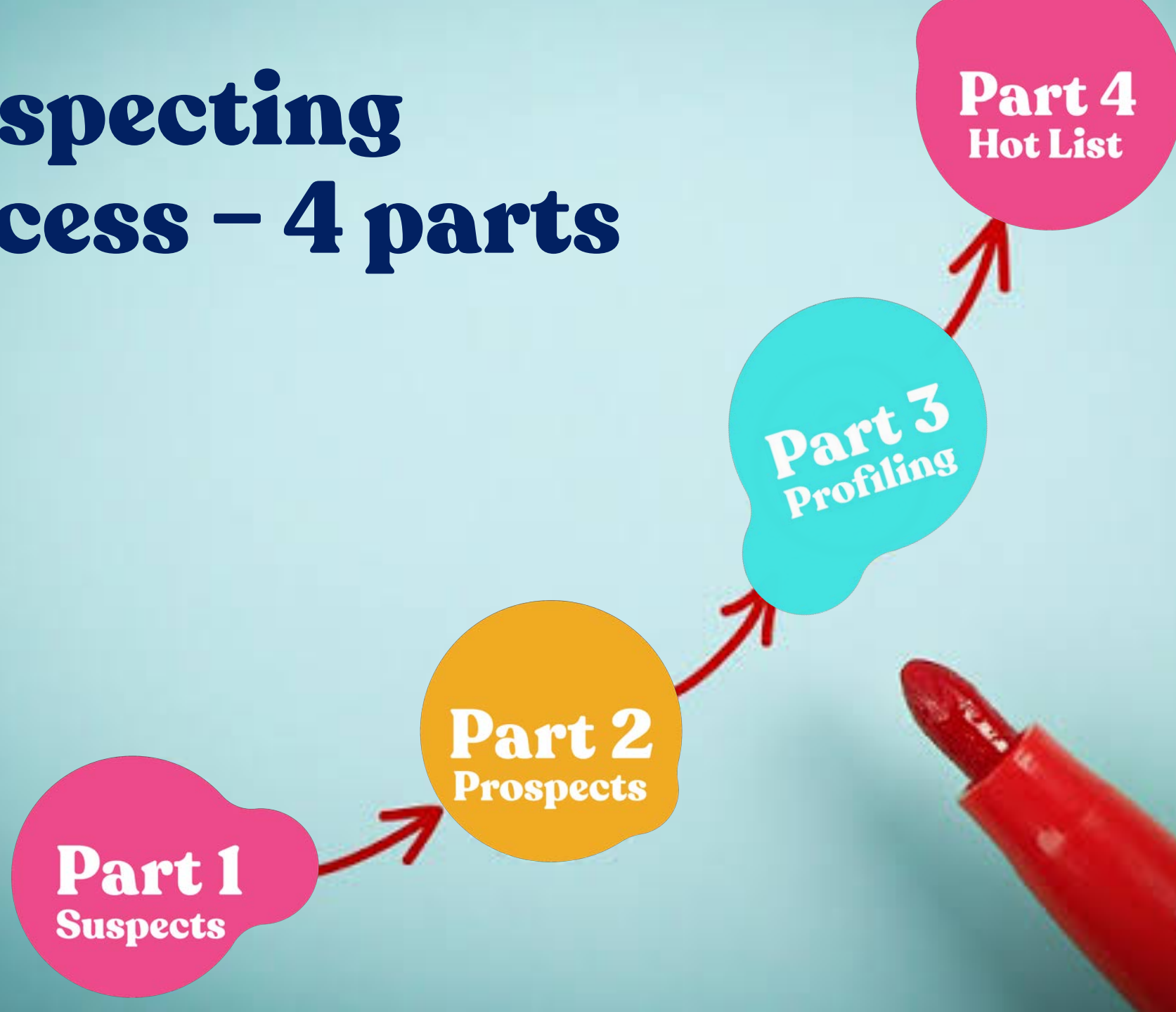
# 3

## Prospects list

Identify corporate prospects that align to your brand, using our unique Bullseye method. Suspect List > Prospect List > Hot List Research.



# Prospecting process - 4 parts





***Greening  
Australia***

# SUKIN X REEF AID



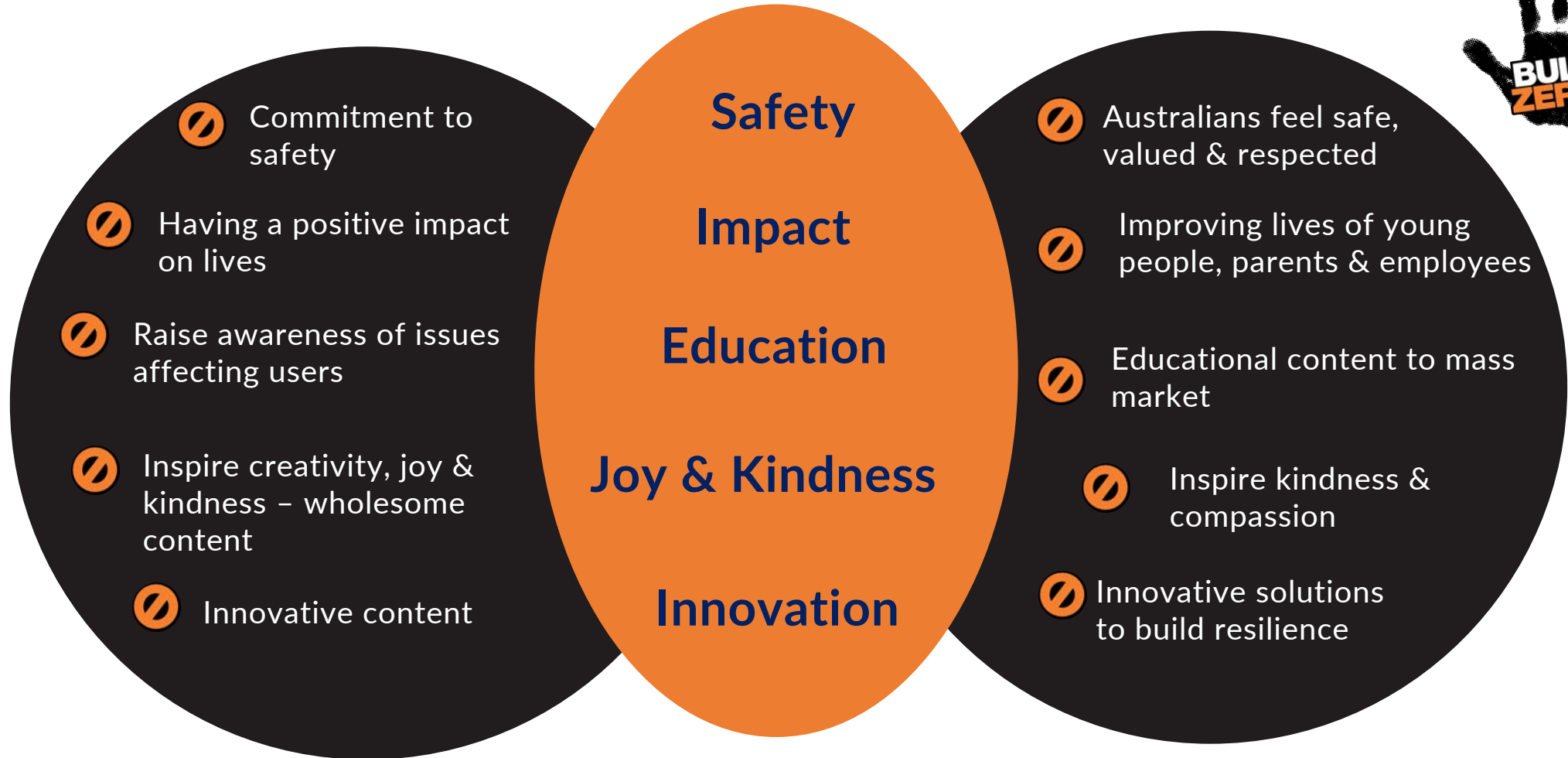
# 4

## **Credentials presentation**

Compile compelling slide-deck, craft story and/or video for first meeting with corporate prospects.



# WE'RE A GREAT FIT!



# 5

## Partnership model

Place a \$ value on your brand, using our unique BaFF formula. Create a Corporate Partnerships Model and Rules of Engagement.





Save the Children

# MOBILISATION MODEL

Equip. Deliver. Transform.

**NZD\$200,000**



Equip our teams on the ground with the investment needed to develop safe and resilient communities



Equip parents with positive parenting resources



Transform the speed at which we respond to disasters in the Pacific and triple our investment levels



Equip educators with practical child rights resources through our Education Hub



Transform our brand recognition through mass market promotion



Deliver advocacy campaigns (eg. affordable housing) to affect change at government level





**Our major partners**



[See all our sponsors](#)




**Insurance**   Claims   Quotes   Help & FAQs   Search

## Australia's best value pet insurance

If you find a lower comparable quote, we'll beat it<sup>^</sup>

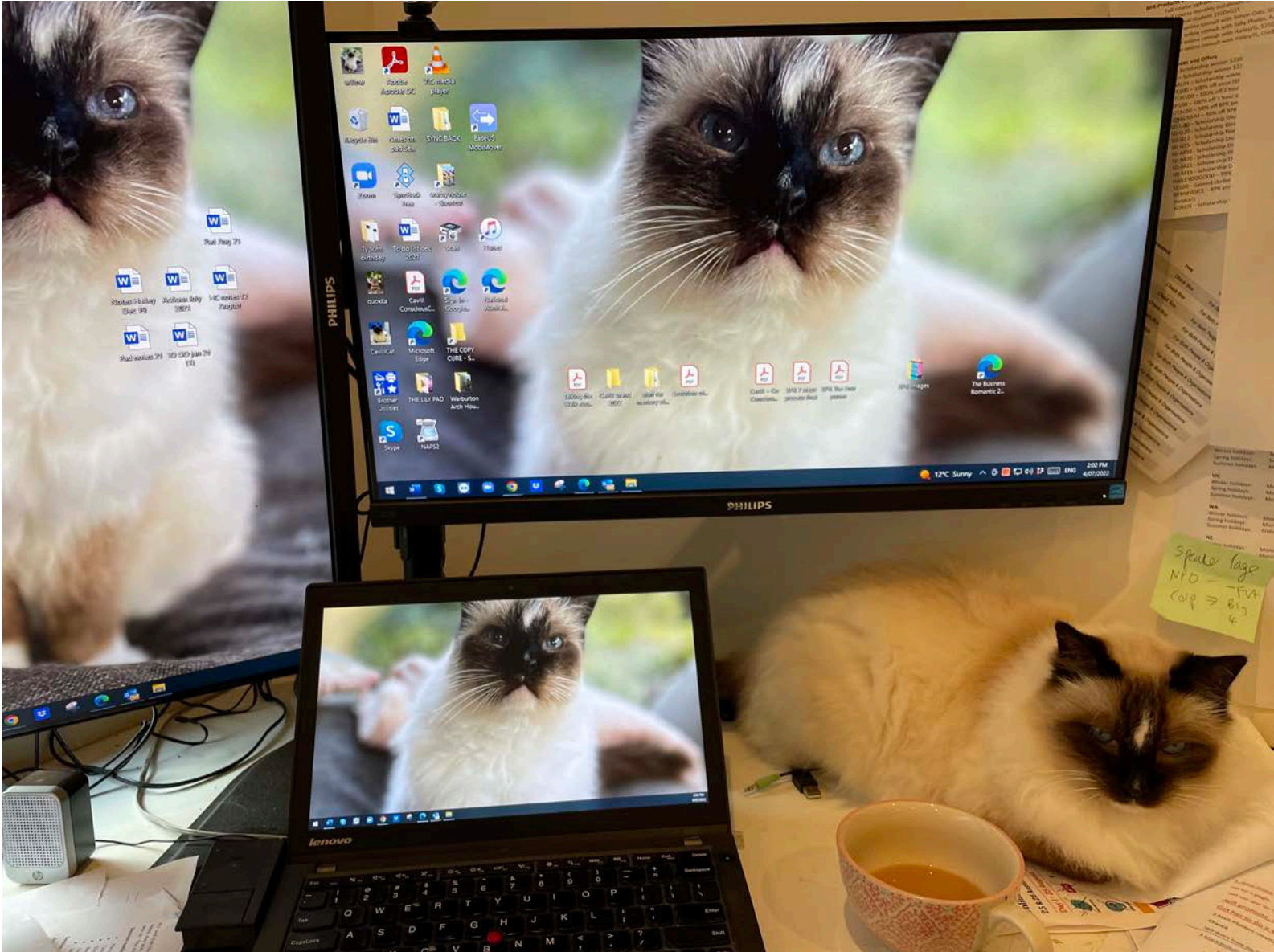
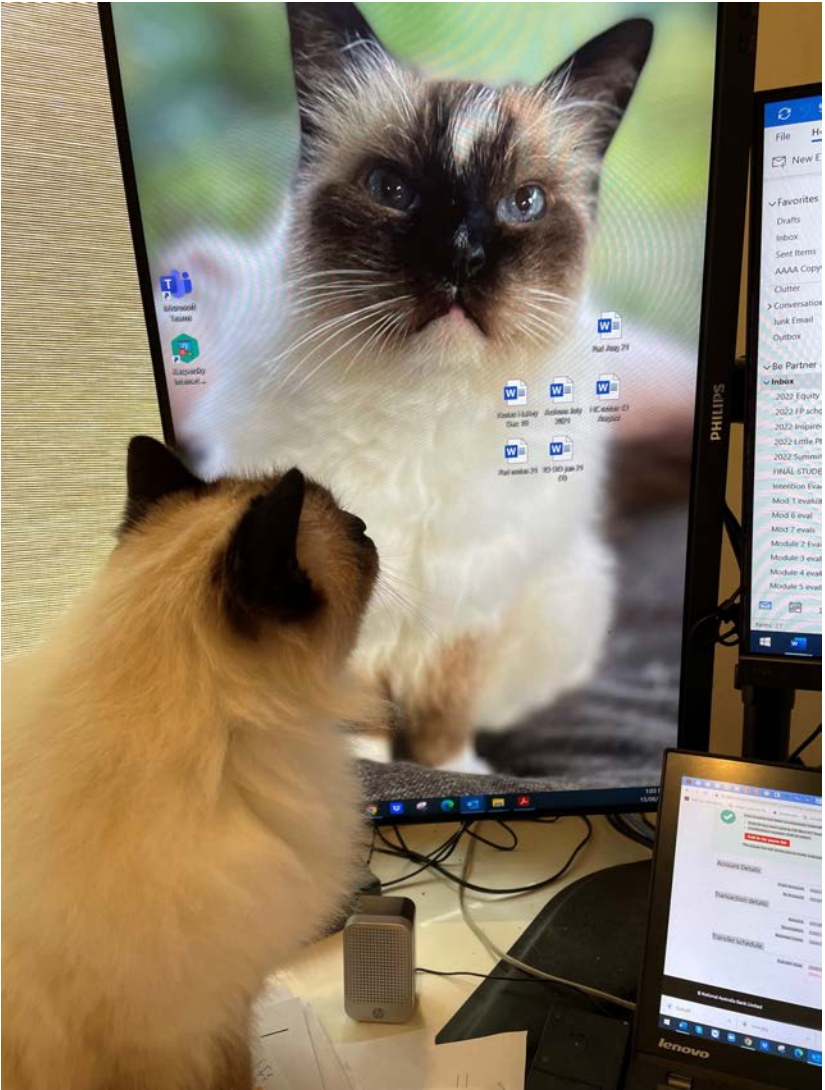
[Get a quote >](#)



**PetRescue**  
\$10 from every new policy helps a pet find a home

The main image shows a man in a light blue shirt and white pants sitting on a bright green park bench. A small brown dog is sitting on his lap. Next to him on the ground is a black Woolworths shopping bag filled with groceries. The background is a plain white wall.

# Hailey's cat willow





# **Finalisation & Review Management & Board approval**



6

## The approach

Craft compelling email for each Prospect in readiness for February pitch period.



# 7

## Secure partners

Meet & negotiate with interested corporate prospects. Obtain brief. Secure partner.

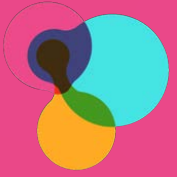


# 7 Steps: Free Infographic



# Why do charities fail?





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Ready.com**  
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**“Readiness”**



# Bully zero



**CASH**  
**\$2.6M**



**AWARENESS**



**DIGITAL**



# Helpful Resources

- Readiness Q&A – [FREE](#)
- 4 Purses [Infographic](#)
- 7 Steps [Infographic](#)
- Set your Intention – [FREE](#)



# Placing a Dollar Value on your Precious Brand

(For use by Corporates)

Workshop 11 April 2024



# Readiness Q&A



# Readiness Score



**“Luck is what happens  
when preparation meets  
opportunity”**

**Roman philosopher Seneca**



**Thank you**

**Q&A**

# Connect with us

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