



# HOW TO MAXIMIZE YOUR COMPANY'S CHARITABLE GIVING



By Amy Kauffman



## WHY THIS BOOK

I've spent the better part of six years learning and listening to what is going on in the space between corporations and nonprofits. It's what I do for a living. Sure, I'm a CEO of a tech company and we provide a software solution, but my day to day job is to listen. To you. Or to people like you.

On a weekly basis, I have the privilege of listening in on conversations with people who are managing incoming requests for donations or sponsorships. I dare say, I probably have the single-greatest treasure trove of knowledge about what's going on in America in this space between corporations and nonprofits.

It's a gift, really. To know and see what's going on all over the country. To see the generosity of company after company giving to local community causes. It's amazing. Maybe someday I'll figure out how to package these stories, but for now I'll leave you wanting more.

At the beginning of this year it occurred to me that I had all this knowledge of this "space", but other than offering a solution to the problems (which is great, don't get me wrong), I wasn't doing anything with the actual knowledge I had gleaned over the years, except for making our product better.

I started asking myself an important question. "What could I do with it?" I wanted to share the information I now knew, but I wasn't sure how to do so. I understood that this "space" and the people a part of this "space" were connected, so I decided to host a few in-person events and see what the response would be.

Portland first. Then Chicago. We're off and running to New Hampshire and Vermont in a couple of months.

The feedback from the first two events was incredible which is why I decided I needed a faster way to share this information. I can't, and I won't, be everywhere to run 3-hour workshops, but I can, and I have, turned these events into an easy-to-read format that allows you to access it yourself no matter where you are or what intervals of time you have available.

The benefit of an in-person event is the commitment. When you RSVP that you'll be there, you block off time to be present there. However, reading is more challenging. We don't block off time to read usually, and thus, we read small snippets and are easily distracted.

It will take you about 2.5 hours to read this book from start to finish including the brainstorming exercises. I recommend blocking off the time on your calendar right now to consume this in a way that suits your schedule. In my experience, if you aren't intentional about reading, the likelihood that you actually will do so is pretty slim. So pretend we're having a one-on-one workshop together. Because we are. Sit down with me and let me share with you what is going on in the space between corporations and nonprofits.

## MY EXPERIENCE

Six years ago, I started Givily, a cloud-based software platform designed to make giving simple. How does one arrive at creating such a thing you might ask?

Good question.

I was running a daily deal platform, such as Groupon or LivingSocial, that channeled money to local nonprofits in Rochester, NY and was already in that “space” between businesses and nonprofits. I talked with both entities several times a week, and both frequently mentioned the challenges with this transaction. It caused me to wonder if there was a way I could help alleviate these challenges.

A close friend of mine who was experiencing these hardships owned a restaurant and one day we grabbed coffee to talk more in depth about the specific struggles. After hearing the details of how many community organizations reached out on a weekly basis, how many different ways they would ask (phone, email, letter, stop in), and that there was no good system to approve them internally, I was convinced there had to be a better way. I was sure there was something online that could lessen the burden of what he was experiencing.

However, I was shocked to conclude that I couldn’t find anything on the internet about ..... so at our meeting, I told him I would build something. Today, he’s long out of the restaurant biz, but here I am – still diving deep into this issue of the relationship between corporations and nonprofits!

I really did not know how to “build something”, in relationship to software. I graduated from college with a communications degree. I knew nothing of software, but I knew people, and marketing, and became determined to figure out the software side. I didn’t need to know how to program. I just needed to know the right people.

Fast forward six years and here we are! We’re happily serving some of the most iconic brands in the United States, including Ben & Jerry’s and Clif Bar.

I love what I do. It’s a dream come true. I get to wake up every day and work with amazing and generous people, in companies all across America to help them better manage and track their charitable giving. It’s incredible. Pinch me.

## MY PASSION

It's not just the actual work that I do that is incredible, but it's living out my purpose on the daily that makes me come alive around the work.

I believe people are created with unique gifts and abilities for a specific purpose and there's nothing I love better than helping them unlock that potential.

Terry Orlick, an author of over 20 books, found his passion helping young children and teenagers learn the habit and importance of thinking positively. He also coached thousands of Olympic athletes, helping them obtain excellence in their arena of competition for over 34 years. He says this about "passion":

*"The heart of human excellence often begins to beat when you discover a pursuit that absorbs you, frees you, challenges you, or gives you a sense of meaning, joy, or passion."*

I believe this about companies. You as a company have something unique to offer for a specific purpose. Helping you unlock that potential is what gives me "a sense of meaning, joy, or passion." It is through the process of anchoring companies into their respective purposes and living them out in an authentic way that we will achieve lasting change in our country.

My contribution to this lasting change is to help companies/corporations/businesses (however you define yourself) understand their true purpose, to know how to align their purpose with their charitable giving, and to create strategic and powerful partnerships in the community around that.

That's it. That's what this book is about.

My hope for you as you read this book and move through the exercises that are provided, is that your company's purpose will be clarified for you in new and empowering ways, that you recognize what your brand should be focusing on in the charitable space, and that you are inspired to create the right partnerships in your community in a way that's mutually beneficial.

Helpful. That's what I want this book to be.

I want it to be so helpful that you get your marketing manager to read it (if that's not you). I want the messaging and exercises of purpose and alignment to be so helpful that you want to share it with your colleagues.

My intention for this book is to educate, and inspire, and build a personal connection between you and me, and between your brand and Givily.

## STRUCTURE OF THE BOOK

This book is divided into 4 sections: Purpose, Alignment, Strategizing Partnerships and Maximizing Partnerships. You'll see these 4 categories several times throughout this book.

At the end of each section there is a brainstorm exercise. This is where the clarification - true education and inspiration - is nestled. Don't be in such a hurry to get through the book that you miss what is most valuable - the exercises. And you won't know how to do the exercises unless you at least skim each section for context.

In order to make sure we are on the same page, I'd like to define a few pieces of vocabulary before we move on. In this book, the word "company" will refer to the for-profit entity who acts as the charitable *giver*. You may think of yourself as more of a business, corporation, or foundation, but for this book we'll use "company."

The term "organization" refers to the nonprofit entity who acts as the charitable *receiver*. This could be a true nonprofit, or it could be a community cause, but for this book we'll use "organization."

## PURPOSE

Elie Wiesel was a man who had purpose. As a survivor of the Holocaust, he was passionate about sharing his experiences from being held in the concentration camps, and stood up for many other oppressed people groups throughout his lifetime. After being awarded the Nobel Peace Prize in 1986, the Norwegian Nobel Committee referred to him as a “messenger to mankind, one of “peace, atonement, and human dignity.”

To define someone’s personal purpose, you must be able to speak to your existence. Why do you exist? What were you created to do? What drives everything you do? Wiesel knew the why of his existence. Do you?

Your personal mission, therefore, is how your purpose plays out in everyday life. What are the specific gifts and abilities with which you’ve been endowed to share with the world?

Purpose and mission are a beautiful duo. Once you know why you exist, and what you were created to do, you can then execute the how.

I ran a personal branding agency for a few years and saw first hand the power of people who grasp their purpose of existence. INCREDIBLE. When people truly understand why they were created, they’re unstoppable. It’s in every fiber of their being, and no person or experience can take it away. It just is.

I’m a firm believer that you have to have *personal* purpose before *professional* purpose.

It’s really hard to perform well in the workplace if you’re not sure why you exist in the first place. That sounds extreme, but it’s absolutely true. It doesn’t feel good to create a graphic, marketing plan, or social media campaign if you don’t understand why you’re alive. It feels inauthentic and crummy.

When our personal purpose is squared away we feel liberated to give our time and energy to something that aligns with that. Hopefully the people working for a brand are passionate about it, and if this is true, it is because their individual purposes orb around the company’s purpose.

I’ve seen it happen over and over again when people have clarity about their WHY. When we understand the accurate WHY of our existence, we see life with great awareness. The WHY is in every fiber of our being and impacts every word out of our mouth and every decision we make. With this awareness and understanding, people are energized and empowered to get after their best life in a whole new way.

Countless times I have sat across from someone and read to them a statement that was the clarifying summary of their purpose – their answer to WHY am I here? It was first time that most of them had heard it. They cried. And it was the same every time. Slow nod of the head. Yes. That. That IS me. That is undeniably me. Every day, in every moment, with every person and every interaction. That is me. And I am proud.

For some it was the first time they felt truly validated or fully understood.

It's important to note that the work we did as an agency wasn't about imputing a purpose on someone. Our process pulled back the layers of a human and gathered enough information about that person that we could articulate their WHY in one sentence.

Knowing your personal why is empowering. Blake Mycoskie, the founder of TOMS Shoes, believes just that. He says, "If you organize your life around your passion, you can turn your passion into your story and then turn your story into something bigger—something that matters."

I'm going to give you the personal branding questions that we use at our agency, followed by some specific instructions to hopefully get you one step closer in understanding your purpose.

I have never given away this content, nor have I let someone walk themselves through the process. I can't guarantee any outcome other than more awareness of self, but I'm hopeful it will bring you such clarity that you are orbled around your exact purpose and stare at it with curiosity, ultimately leading you to amazement.

Let's get started.

What you'll need to do:

1. Find another person. You're going to need someone else for this personal exercise. Select someone with whom you feel safe. Maybe they are a close friend, or maybe they are an acquaintance that every time you connect with them you feel undeniable trust, safety and value. I do not recommend a spouse or family member for this exercise as it will skew the outcome. It's important you select someone with whom you feel NO INHIBITION. Take your time in finding this person. It's worth it.
2. Schedule a 90-120-minute video chat. I recommend video chat because it gives you the space away from a person to feel empowered to say what needs to be said in response to the questions.
3. Make sure you record the call.
4. Get a transcript of it after it's complete. (Or have your friend write down almost everything you say **verbatim**.)

Here's what you'll do on the call:

1. Give your call partner the following personal branding questions to ask you.

#### RELATING TO PEOPLE

\*What are some things about your family, friends or colleagues that really annoy you? (Pet peeves)

\*What are things people say or do that cause you to shut down internally?

What are some things other people tell you they like about you? (traits)

\*What are two thoughts you want people to have after connecting with you?

#### INTERNAL FRAMEWORK

What are some things you like about yourself? (traits)

What have you done in your life that you are most proud of?

What are two things you've been told that you'll never forget - that mean a lot to you? Who told you them?

There are usually 1-2 common ideas that run through your mind at any given moment, no matter where you are, who you're with or what you're looking at. What are those ideas?

What do you go out of your way to hide about yourself?

What standards do you hold yourself to?

#### MOTIVATIONS

What are the times you are most inspired, most motivated, most charged up?

If you could have one single wish granted, what would it be? First thing to your mind!

What makes you excited to get up on a great day?

What is it that drives everything you do?

You've just had a bad day. why do you feel unfulfilled?

If you could do anything, without money or time restrictions, what would it be?



## RELATING TO THE WORLD

\*You are on a billboard next to a person or group of people, who is on there with you?

## CLOSING

What kind of legacy do you want to leave behind?

If you were to die tomorrow, what would be your biggest regret?

What's life all about to you? Why do you do it?

\*You get 3 minutes to talk to your family and friends - it's the last thing you'll ever tell them. What do you say?

2. Have your call partner ask you each question, giving time for you to respond.

Call Partner: Go deep. Gently prod for more info and ask why. Rephrase questions like, “so you said that it bothers you when XYZ happens. Why does that bother you when that happens? What do you feel? Why is that?”

You, reader, are going to analyze all your words later, but the goal is for your call partner to make this more of a deep, trusting conversation than for it to be the answering of questions. Actually, you should forget that you are answering questions, that's how much of a real conversation this should become. You need to get into a state where you're riffing on each question, saying things you've never said, didn't realize you thought, wondered where it came from. Go deep. Go deeper than you've gone before.

After the branding call get a transcript of all your words.

Read through the transcript somewhat quickly and write down the 3-4 main ideas from the entire transcript. If you see more than that, it's okay. What you'll find is that there are usually 3-4 main ideas that could have sub-categories.

If you're not good at spotting ideas, ask someone close to you that you trust to do this.

Next, send the transcript to your call partner and ask them to write down the 3-4 main ideas they see when they quickly read through the transcript. Compare the main ideas and settle on 3 of them.

What I've seen over and over is that there are few main ideas that drive everything – every interaction, every pet peeve and every dream.

Once you spot the main ideas written down, the next question to answer is which one is the main driver?

The main driver in this equation is the one that is REALLY the end goal for you. Look at your main ideas and figure out at the very end what needs to be achieved.

THAT idea is going to be at the very end of your WHY statement. It's kind of like an equation and this is what it looks like:

Belief statement: I believe Main idea 1 --> Main idea 2 = Main idea 3 (End Goal)

Another way of reading it would be this: You believe *something* impacts *something* for an ultimate outcome of \_\_\_\_\_. Main idea three is actually the real REASON for the drive of idea 1 and 2.

Here is an example from a woman who went through our branding process:

Belief/WHY/Purpose: I believe when you're pursuing your best you will have the greatest influence.

Essence/how she shows up in the world: I'm an example in order to influence those around me.

Configure it as a math equation and jockey them around to see what resonates more. You need to allow yourself to be intuitive here. There might be one order that instinctively resonates more than another. Maybe linguistically it doesn't fit together well. That's okay. We will work on the grammar and language in a minute.

For now, the main ideas need to be extricated from the transcript and put in the right order.

If you're passionate about getting this part right and don't feel like you nailed it, we provide branding clarity service at a nominal cost. Email [clientservices@givily.com](mailto:clientservices@givily.com) if you are interested.

Once you have the main ideas and they are in an order that resonates with you, this is the beginning of your belief statement. Yay! You're almost there!!

First, take a look at the pronouns. Is this what you believe about yourself? Those you love? The world in general? A certain group of people? Articulate in the belief statement the proper pronoun based on who this belief is about.

For example, a belief may be about people. All people? Every person? Personal or global? And it could be articulated: I believe when I, I believe when we, I believe when people, I believe when everyone, I believe when every person, I believe when humans...there are a lot of ways to articulate the pronoun. The pronoun can be in main idea 1, 2 or 3 as it defines the scope of the belief. Or maybe the belief isn't about people. It would look more like the following: I believe we have an obligation to maximize what we've been given for a purpose greater than ourselves.

How that shows up in the world: I help people maximize their resources.

OR

Belief: I believe love grows with authenticity.

How that shows up in the world: I let you be who you are.

OR

Belief: I believe each life is uniquely valuable.

How that shows up in the world: I help people understand their worth and how to give it to others

As you'll see in some of the examples above, if people aren't the focus of the person's existence, the pronoun isn't really part of their statement. If people are the focus of your existence, work over the pronoun until it resonates with you and your main ideas. If people aren't the main focus of your existence then recognize that and move on to the next piece.

Next, look at the word following the phrase, "*I believe*". Here are some variations of that: "*I believe when,*" "*I believe that,*" or "*I believe people.*" Figure out that transition word.

Once you have a solid transition word, look at your prepositions. If you don't know any prepositions or you need more ideas, don't be afraid to google them! Choosing the right preposition word is extremely important because it affects the meaning of the belief statement tremendously. Work it over. I always use pen and paper and a google doc. Don't delete anything. Keep going, rework, re-word. When you feel like you're going in circles, take a break and come back to it.

If the main ideas are in the right place, and you've worked over the wording, let the wording rest and cogitate on it over the upcoming days. The way you want to articulate your belief will surface soon.

Alright - so there you have it. Your belief statement. YOUR PURPOSE. YOUR WHY.

Again, it's not going to be earth shattering to you. That never happened when I was delivering belief statements to someone. (Remember the slowly nodding heads and realization moments. They were solemn and serene, but not epic.) This belief is so much a part of you that if anything you'll think, well, yeah, of course! Don't other people care about this too?

Because of what you believe, why you believe it, and what you want to do with that belief, you show up in the world a certain way.

Now that you know your personal WHY, we can step into connecting your personal WHY and your company's WHY.

This should be the intersection of who you are personally and who you are professionally. You should be working in a line of work that resonates with you because it coincides with what really drives you.

The tough question we need to ask now, however, is whether or not this is true in your life. Does your purpose truly align with your position and your company?

Your next step, therefore, would be to do a personal brainstorm on the company's purpose. Differentiate between your company's purpose and its mission.

Before we properly go about that, we need to make sure the company's purpose/why is accurate and clear. Many times companies don't do a good job articulating their purpose. That sounds harsh, I know, but you've seen it a hundred times and so have I. You hear a company name and tag-line and you're left thinking, *what are they all about?? That sounded cute, but it lacked substance and clarity.* You may be working for a company like this and think the tag line or elevator pitch is not a good representation of who you are and what you do.

Let's get clear on your company's purpose and mission.

Write out your company's purpose. Say it out loud.

Write your company's purpose here:

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It's very possible you have a better way to articulate the purpose of the company. If you really understand the product or service offered and why it's needed in the world, often you will articulate this in a way that's more clear and relatable than what is currently in place.

What do you think your company's **REAL** purpose is?

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Many mission and purpose statements answer the question of WHAT or HOW vs. WHY.

If you find your company's purpose speaks to more of the what or how of its existence than the why, no problem.

Read it out loud then ask "Why do we do this?" Go as deep as you can. For a small or young company the purpose/why of the company is typically tied directly to the founder. If a bigger company, they've often lost their way and lost their why. They've gotten really good at what and how, but drifted away from the why.

Write down every thought that comes to mind. Uncover the WHY of the company even if your leadership hasn't been able to do so effectively.

After you've done this, you will have differentiated your company's purpose and mission.

Remember,  
PURPOSE = WHY  
MISSION = WHAT/HOW

Now that you've articulated your company's purpose, on a scale of 1-10 does it energize you to say it?

Where on a scale of 1-10 does the way you do it (how/what) energize you?

Does the job you have, and the current brand you're working with, have a purpose that intersects with your purpose?

Write your purpose from above here:

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Write your company's purpose from above here:

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If you told me your purpose and your company's purpose would I see a dotted line from one to the other?

I hope so.

Write the correlation between your personal brand and your company's brand.

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If there isn't a direct correlation between your purpose and the line of work you're investing in, you might have a clear and deep answer as to why you aren't happy in your current position, or at the very least why something seems off. Maybe finding something professionally that aligns with your personal purpose is a next matter of priority.

If you're deeply happy, you have more reason to give double the effort at your current position. Give it all you've got and don't hold back.

It is of paramount importance that people feel a purpose in their professional environment. Venture capitalist Tony Tjan say this:

"It turns out there are many ways to make a billion dollars: real estate, investing, gaming and entertainment, retail, technology, and good old-fashioned inheritance. But the most interesting (and most respected) businesses and personalities are also the ones with the **strongest and most authentic purposes** behind them."

We love a brand with authentic purpose.

There has been some recent changes to our society. Let's give a big thank you to millennials for wanting to see transparency, clarity, and purpose in the companies they work for. Because of this desire, we're increasingly more aware of the importance of companies finding exactly that. Their purpose.

Millennials are the driving force for brands moving toward a clear purpose/why and transparency of communication. They want to live every day to the fullest and love every day in every way. They also need to work to provide for their families so they're demanding that the places they work be amazing.

It's quite amusing and remarkable all at once. God bless those millennials. Sometimes we wonder if they know what work is, but they sure do bring a lot of heart to things. This is in contrast, of course, to baby boomers who surely knew how to work, but we wondered if they had a heart under their stoicism.

The rise of branding and design agencies is at an all time high as of this year, 2018. The demand is great. Companies in all industries of all shapes and sizes are realizing their need to share their why.

Brian Halligan is the CEO and Co-Founder of a company called Hubspot. Hubspot changed the marketing and sales world by humanizing the process of connecting with other businesses. They did this because of millennials. No one wanted to be interrupted by sales calls or spam emails anymore. They wanted to be treated as individuals. Brian says:

*"The way I think about culture is that modern humans have radically changed the way that they work and the way that they live. Companies need to change the way they manage and lead to match the way that modern humans actually work and live."*

Millennials only want to shop where the WHY of a brand is apparent. Brands are scrambling to stay current with the astronomical numbers of millennials replacing boomers in the market place. This is driving the number of design agencies up. More clarity and purpose for all! My heart skips a beat!

Not only is clarity of purpose good for the bottom line, but it drives engagement internally. Clarity of purpose drives engagement from the inside.

It's hard to rally around something we aren't sure is the real purpose of our brand. Worse yet, it's really hard to rally around something that isn't clear on either why or what or how.

Some of you reading this are feeling frustrated because you feel trapped:

1. In a brand that cares deeply about what they do but haven't articulated the real reason why they exist,
2. In a brand that cares deeply about what they do, can explain the real reason, but don't live it internally,

3. With a brand that doesn't care deeply about what they do, but they've nailed the how and what for a market segment so it seems their purpose is clear and no one is actually driving after more clarity of purpose.
4. With a brand that's recently spent heaps on marketing and branding and everyone thinks that since it's new it's great.

I've seen it all.

Any of those scenarios are cultural train wrecks waiting to happen.

When the purpose of a company is clearly articulated it empowers every aspect of the company. In his book, "Start with Why", Simon Sinek casts this same vision about how having a why impacts how you think, act, communicate, and inspire others. He believes that "customers will never love a company until the employees love it first." And I agree! In order for your company to be successful outwardly, it must be successful inwardly.

Why does your company exist? You should be able to state this clearly in one sentence. Not what you do, or how you do it, but WHY.

Howard Schultz, the CEO of Starbucks says, "In this ever-changing society, the most powerful and enduring brands are built from the heart. They are real and sustainable. Their foundations are stronger because they are built with the strength of the human spirit, not an ad campaign. The companies that are lasting are those that are authentic."

WHY DO YOU EXIST? What is the end goal of it all?

Please tell us. We want to know. We want to love your brand. We want to buy from you. Please show us who you really are.

Authentic and clear purpose attracts the right employees, long term customers and community organizations. It motivates employees to work hard toward a common goal, customers to engage with your brand, and community organizations to find appropriate partnerships.

## ALIGNMENT

I love to see pictures of peaceful newborns all snuggled up in a blanket. It's just like it should be.

When my daughter was just a few days old I was having a really hard time getting her to sleep. She was fairly content for the first few hours of being awake, but her eyes were huge and it looked as if they couldn't close. She looked like she wanted to sleep, but after six hours of not sleeping, I knew something wasn't right!

Being a first time mom I was still in the clueless clan about child rearing so I decided to take her to my parents house to see if they could help.

My mom whisked her off as soon as I got there to try and get her to sleep while my dad and I brainstormed possible causes.

His first question to me was, *"how much caffeine did you have today?"*

*"Hmm, I just had black tea. Oh, regular black tea. Oh, regular black tea is caffeinated. Oh boy, yep that was it."*

I had never noticed the effects of caffeine on my body, but I had just birthed a sensitive little body and she wasn't faring so well with the stimulant.

Caffeine didn't align with my newborn. It confused her body. She was tired, and wanted to sleep, but couldn't.

Giving to charitable causes that don't align with your brand is like giving a newborn caffeine. To put it plainly, it just doesn't make sense. You must align your community engagement with your company purpose.

It's important to align your brand with organizations (nonprofits, community causes, etc) that make sense. The partnership should provide mutual benefit. Both entities should be able to announce their partnership on social media and have everyone who reads about it say, "that makes total sense why they would partner!"

One of my favorite examples of this is with the brand, Red Duck Foods. (Shameless plug - they make all kinds of amazing organic sauces and condiments! Check out [redduckfoods.com](http://redduckfoods.com).)

I had a call with Red Duck Foods several months back. They were giving to everyone and anyone with no strategy behind their giving.

The first thing they needed to do was have a team meeting and decide what categories of giving made sense for them to give to based on their brand and purpose.

The team met together and had a great brainstorm session.



Two weeks later I had another call with them to hear about their meeting. In a short time of brainstorming it became apparent based on their brand and purpose that they cared about zero food waste efforts. That's what they wanted to give to. That and only that. Now, that's still a broad category when you think about it, but for the first time they had very clear parameters around their giving.

They felt relieved and excited to live out these newly articulated values!

About 50% of the companies that I talk with daily have giving focuses/priorities and the other 50% are those who are still giving to every Tom, Dick and Harry who asks them.

If you have giving priorities mapped out already - well done. I will still challenge you to run them up against your company purpose and make absolutely sure they align with each other. If you find one of them doesn't align, talk to your leadership about it. See if you can tweak it to make sense with your brand, or eliminate it altogether.

If you're still running your charitable giving pretty ad hoc, let's equip you to create giving priorities and align your giving with your purpose.

I'll give you a quick snapshot of an application form we use with Givily. All of our application forms are white labeled to look and feel like our clients and include a question on page 1 to be sure the applicant aligns with the giving priorities of the given client.

See below.

**Form Numi Tea**

Step 1: Organization

To apply, please complete the form and we will get back to you as quickly as we can.

You are applying to **Numi Organic Tea**

**\*Required**

Organization Name\*

Contact Name\*

Contact Email\*

Contact Phone Number\*

NEXT STEP

Are donations to your organization tax deductible?

Yes

No

What category best captures the field of your organization/event?

Health and Wellness

B Corp and Social Enterprise

Education and Research

Arts and Humanities

Sustainability

Other

If other is noted above, please specify

NEXT STEP

By clarifying your giving priorities and telling donation seekers who your brand desire to partner with, this saves you AND THEM time.

We've got an archaic notion that we're mean if we filter anyone out at the beginning. Instead, we've wasted people's time that we have no intention of supporting. How kind is that?

When I was in the nonprofit industry, I talked to several others in the field who LOVE to show up to a brand and know IF they give, WHAT they give, and WHO they like to give to. If they don't fit the bill or need what they offer, they'll ask someone else. That simple. It's not mean.

Make no mistake - people love alignment, even if they get cut out of the pie! Because (drum roll please) it makes sense!

If you don't have giving priorities, it's time to get some. It's that straightforward.

Here are some live examples some of our clients are using:

Children

Literacy

Culture & the arts

Environment

Health & Wellness

Women's organizations

Running

Homeless

Mentoring

Based on the purpose of your company, what might some aligned giving categories be?

Take 5 minutes and brainstorm who you think your company should be giving to.

Brainstorm a list of giving priorities here:

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Next, set up a group meeting with others who you need buy-in from, or create a google doc where everyone can throw their best ideas in it. Put a deadline on the doc and make it in the next 48 hours. You need 2 minutes in a google doc from any relevant party on this. Then make some decisions. You don't need to trim your giving priorities back to three. You can have five, but you probably shouldn't have 10.

What did you decide are your top giving priorities:

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Okay, so now that you've got your giving priorities aligned, it's time to use them as a filter. Put these giving priorities on your website, on your hard copy donation request submission form, or the footer of your email. Put them anywhere and everywhere someone is trying to ask for something. It won't filter out everyone, but it's a grand start. If nothing else, you'll have good recourse to deny someone if your giving priorities are clearly detailed out to the public.

At this juncture I think it's important to spend time talking about philosophies of giving. I've heard a lot of stories and seen a lot of scenarios, and I believe that everything falls into one of the following three categories:

- Giving to give
- Giving to get
- Giving that's mutually beneficial

Let's define each of these categories.

Giving to *give* looks like a lot of emails, asks, yeses, warm fuzzies, ad hoc and harried staff. Giving to give lacks intention, brand awareness and a focus on using donation as a powerful marketing strategy. I see a lot of this. There is a lot of heart used here.

Giving to *get* is when a company donates to a cause simply because of what they can get in return such as a promotion or brand awareness. Other than the fact they are donating products, they are self-focused. The

outside looks good, and the head is used for strategizing the advantages for the company, but it lacks heart; therefore, it lacks authenticity. It's a hypocritical give.

Mutual beneficial giving, on the other hand, is profitable for both sides. It benefits the organization monetarily (or with product), and helps them to promote their event, raise funds, or provide a better attendee experience which reflects well on their brand.

For the company, the benefits are increased brand awareness and built-in audiences to sample and experience a product. Those benefits are unique to each entity.

Here's what's not unique to each entity, but could be shared in a great partnerships. This is a short list to get your wheels turning.

Cross promotion - Events, Panels, Recorded clips on social media

Business referrals

Share/expand audience

Resource sharing - Co-sponsorships, Space

Lend credibility

Collaboration

If we go back to our original definition of alignment, you will remember that it refers to a position of alliance, being a union of two organizations for mutual benefit.

Align with organizations that make sense to your brand and figure out how to partner in a way that provides mutual benefit.

Please know, as the company, you're going to need to lead this process. This is important to realize. It's not that an organization is unwilling, it's that they are less knowledgeable, less staffed, less tech savvy, less idea savvy in general. You'll have to brainstorm a little together to build rapport and understand an organization's true needs. Narrow down a few good things that would be mutually beneficial and write out an implementation plan. There's a bit of handholding that happens here, but don't get confused. It's not the organization digging their heels in, it's a lack of knowledge and business savvy. Use this as an opportunity to educate. It will benefit an organization tremendously in the long run.

## STRATEGIZE PARTNERSHIPS

My daughter is three and my nephew is four. While navigating play together one day, they both wanted to play Mama and baby cheetah (you know how those made up games go). The only issue was that they both wanted to be the baby cheetah. My nephew, having a bit of cognitive advantage on my daughter due to age, asked her if she wanted to be in charge. She, of course, stated that she did! “Mama cheetahs get to be in charge.” Settled. My daughter has been mama cheetah ever since and my nephew has been the baby cheetah.

Although a story of kids playing, they figured out how to create a strategic partnership that got them both what they ultimately wanted.

That’s exactly what we’re looking to create in strategic partnerships. We want to align with organizations that resonate with our brand’s purpose and once we’ve found those organizations, there’s a lot more opportunity for partnering than just sending along a check or product.

The partnerships we’re creating in our community should be full of great cross-promotional audiences and opportunities. Both the brand of the company and the brand of the organization should benefit from their respective audiences knowing the partnership is happening. What does that look like? Come up with your own ideas!

Write a list of your ideas here:

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There are SO many partnership opportunities!

I believe there are heaps of benefits in creating strategic partnerships in your community, or at least with organizations that align with your brand and mission, whether they are in your backyard or not.

What does partnering do for your brand? Strategic partnerships increase visibility. This is powerful. With one strategic partnership you can gain access to thousands more potential customers. Keep this in mind as we work through some of the rest of the outcomes for strategic partnerships.

Strategic partnerships strengthen each brand’s value proposition. Not only are you standing on your position, but now you’ve got someone else standing strong on your position too. And visa versa. That’s what partnering does. It’s as if you’re an air traffic controller waving all the traffic to look at that other brand and purpose - Buy in! Like them! Love them! They’re great! We like them and trust them and you should too! And their air traffic controllers doing the same thing for you. Buy in! Like them! Love them! They’re great! We like them and trust them and you should too!

Not only is someone pointing at you and giving the thumbs up (and you're doing the same in return), but strategic partnerships increase exposure to your respective values. They don't just talk about what you do, but about why you do it. And you do the same for the organization you're supporting.

If done well, strategic partnerships provide opportunities to create and offer 'exclusive' products for each other's respective audiences. There are countless opportunities here - and your customers will LOVE them!

Let's not forget the anticipated revenue boost that will come from the increase in visibility and props by another brand through a strategic partnership. The only limit to this is the limit to your creativity and implementation of strategic partnering. Employee engagement increases, company culture improves and more of the people that make your brand work get inspired!

I've only touched the tip of the iceberg on the potential for greatness from strategic partnerships, but my goal was more to get the wheels turning and inspire you to drum up your own goodness rather than spoon feeding you the exact right thing to do with an organization now that you know who aligns with your brand and who you should be partnering with.

If nothing else, have a brainstorming conversation with the organization you're supporting about wanting it to be mutually beneficial and see where it goes. Decide to take at least one point of action to support the other's brand and see how it goes. This is a great starting block.

Before we leave this conversation on strategic partnerships I think it's a good idea for you to get a head start. Take five minutes right now and have a personal brainstorm session. Based on the purpose of your company and the aligned giving categories, what might some strategic partnerships be in the community? Be specific! After you have a list of those brand strategic partnerships, write down a list of things that would help your brand if another organization/brand did them. Be specific with this too.

## MAXIMIZING THE TRANSACTION

Have you seen the end of a toothpaste tube from someone who lived during the depression? It's flatter than a piece of paper. They have used every last ounce of toothpaste out of the tube. I'm quite sure the last squeeze looked more like a wrestling match to get every last bit out.

That's a great picture of maximizing a tube of toothpaste.

When it comes to maximizing partnerships, we don't want to go to such great lengths with our partnering organizations, but we should come a lot closer than we usually do. We leave so much on the table. And it's not just us - both parties, your company and the organization leave so much on the table.

The previous chapter talked about a strategic partnership. Once you figure out how to be strategic, there are multiple depths of executing a strategy that help you maximize it.

Let's get an example on the table.

You partner with a local grocery store to pick up their left over produce once a week. The partnership is a benefit to both parties. How could it be strategized better? Maybe the grocery store could share that they allow XYZ organization to pick up end of day donations on Thursdays and share some of the impact of that food donation. Is it in a newsletter or weekly shopper? What about putting it on a poster so that everyone who comes in the store starts off their shopping experience thinking of your generosity in the community? There are six other days to the week which means six other organizations could benefit from the same type of end of day donation and you wouldn't have to throw away any food at the end of the day in your store. You help the local community and the local community helps you. Great partnership!

There are always multiple layers to strategizing, and continuing a partnership gives you opportunity to rework ideas and take another stab at the PR and marketing aspects of it. THAT is what is usually not maximized.

Let me repeat that again because it's worth making a distinction. It's not that the partnership or generosity isn't maximized, it's the PR, social media, marketing and social impact conversations that aren't maximized around giving. There is a lot left on the table here.

You've done the hardest part of creating the partnerships and coordinating a donation - now tell the story of what's going on!

What keeps people from being able to talk about what's going on?

Quite simply, most companies don't collect enough information to be able to talk about their giving as a whole at the end of the year. That's one of the things I wanted Givily's software to solve. People have random info on spreadsheets and it tells them nothing. It's not a story and it's hardly aggregated data from what I've seen.

Every request that comes in is a story.

Every request you grant is a story.

Every partnership you create is a story.

You need to collect enough data up front with organizations to be able to tell a story at the end in light of your brand. Ask enough questions.

One of the solutions to not collecting enough information to be able to talk about your giving in a way that will resonate with your customers is to collect more data at the front end. Ask heaps of questions of those requesting something from your brand. Ask who they are, what they want, why they want it, why they chose your brand, what they'll do if they are selected to receive a donation, etc.

Our customers use a thorough application form to gather information when someone is asking for a donation which allows them to see right away if it's an organization that aligns with their brand, and if it would be a beneficial partner. Once all these stories are compiled it's a great mosaic of PR stories.

For Givily users, these applications are channeled to a dashboard to easily see and decide whether it's something their company should/should not support.

It's not good enough to collect data, the data has to be looked at! Look at it!

Here are a handful of reasons data isn't looked at in a company:

1. It's not collected
2. It's not aggregated
3. The person managing the requests is a mid-level associate and is more focused on completing the work than analyzing the data for higher purposes.
4. Marketing hasn't realized/considered that heaps of customer data are being collected.
5. Marketing/Leadership doesn't know how this data could benefit their brand.

I've yet to talk to a company who was collecting all the information they should have been from the beginning. Because the data wasn't acquired, companies have nothing to aggregate and analyze.

So please, collect enough data, aggregate it, look at and analyze it. If that's not your specialty, give it to someone in marketing who geeks out and tell them you have a lot of it that they may find interesting.

Analyze the data. What do I mean by analyze the data? Find the story that's being told by the numbers.

Your giving tells a story of your priorities, brand focus and mission. It's the perfect outworking of what you're all about, or should be. They are organic stories to show how your brand lives outside a store or manufacturing facility.



If you leave the numbers alone and don't aggregate them you can't see the story. If you put the numbers together by category you'll start to see some interesting facts. Pair interesting facts together and you start to develop a story.

In the most mature and progressive organizations, marketing plans are intertwined with donation questions, data and decisions. They aren't separate from each other. They coincide.

Based on what marketing is trying to do, community relations might add questions to their charitable request form to gather data that would help marketing. With all the info that comes via a charitable request, it is aggregated so marketing can see if there's a market segment developing, or an area they can pursue for more market share.

Make the approval process efficient and effective. The transaction between company and organization has so many possible places to maximize. Making it more efficient to intake a request and look at it saves tons of time. (60% on average with Givily's system.)

Aggregating and analyzing the data has its own magic of maximizing. Another place I find tremendous inefficiency is in the approval process. Get ready for an ugly statistic.

It takes 4-7 emails minimum to iron out the request details for an approved donation. 4-7! We're talking 30+ minutes when you say yes. For those of you who have managed this process you know how time consuming it can be. It's not that the work is difficult or unenjoyable, it's just that it takes a lot of time, and typically it's not the only thing on your plate.

Givily's system uses templated approval emails with the ability to customize in order to significantly scale back the time in responding to requests.

Especially when you're sending a message of denial, you don't need a formal system to get your common response narrowed down and saved somewhere on your computer. Copy and paste this into each email when denying and you'll immediately experience a decrease in time spent. Please. Save HOURS by not writing each response individually.

Back to the approval emails. If you're not using a formal donation request management system, approval emails will still take a good bit of time. Still, there are ways to have a simple format/template saved that you use every time you are approving a request so that you're not rewriting an email several times a week.

If I were to summarize maximizing this transaction it would be:

Ask enough questions at the beginning

Collect & aggregate the data

Look at the data

Find the story in your data

Marry your marketing plans to your donation program

It's time for a personal brainstorm on how to maximize this process. Get out a piece of paper. Draw out your current workflow. (I'll guide you below.)

What points of entry do you have for your donation requests?

Where do they go at their initial entry point?

Who reviews them?

How do they review them?

Who approves them?

Who responds to the requestor?

How is a request fulfilled?

How are you tracking these details?

Where are you reviewing your data?

How are you making plans to intertwine your marketing and donation program?

You should end up with a lot of lines moving from left to right, maybe some boxes.

Next, circle the area that needs the most improvement. (Some of you are contemplating how to circle the entire page.)

Spend the next few minutes drafting a list of changes to be made to this area. Once you have your list of changes, get busy about making improvements.

If you're looking at your current workflow and wondering what Givily might offer to you and your company, please don't hesitate to reach out. Send me an email at [amy@givily.com](mailto:amy@givily.com). I look forward to hearing from you!

Best wishes as you seek to improve this corner of the world! Cheering you on all the way!

Cheers!

**Amy Kauffman**

## CLOSING TESTIMONIALS OF GIVLY

*This software turned the very cumbersome 2-3 person process of reviewing, responding and fulfilling in-kind requests into a seamless one-person, part-time job. - Deidre F.*

*The customer service is excellent- the team worked with my organization closely to get us set up with a customized product that suited our unique needs. - Mariah M.*

*I like the ease of use and the ability to track what we're doing. The customer service is outstanding. - Matt M*

*I love that it is an automated form and we can stop using Excel spreadsheets for these requests. I like that there is an approval process built in. - Tracey F.*

*I love how easy it is to navigate. It is super simple and straight-forward. - Aya O.*

*I like that this software solved a specific problem we had. We had requests coming in from various different sources and our process for approval was not consistent from request to request. Givily allows us to seek the information we need to make better decisions on our charitable giving. It allows us to have a consistent experience from client-to-client and enables a quicker response to requests. Having detailed reporting that allows us to see a historical view is also a big win for us. - Ron V.*