

Charity Partnership 2022-2025

Application Pack



Make
**Good
Things**
Happen

About Morrisons



Headquartered in Bradford since 1899, Morrisons is a British food retailer with over 118,000 colleagues in 497 stores serving millions of customers every week. We are British farming's biggest supermarket customer and all Morrisons-branded fresh meat and everything on our butchers' counters is 100% British

Foodmakers and shopkeepers at heart, we have over 9,000 trained butchers, bakers, fishmongers, cheesemongers and other skilled in-store specialists making more and more food in our stores. Morrisons has its own sites making meat, fruit and veg, fish, bakery and fresh food products – 20 in all – and is unique in preparing and making more than half of the fresh food sold in our stores. Food manufactured in our sites and stores is showcased with 'Morrisons Makes It' branding.

We tailor the offer of each one of our stores to local tastes and demographics. We also offer popular services including cafés, pharmacies, dry cleaners and over 300 petrol stations with further services being added all the time.

Local integration and serving the community is one of our seven priorities. Each of our stores and sites has a Community Champion, who leads our work on the ground to play an integral role in our communities and support good causes.

In response to the COVID-19 crisis, we strengthened our commitment to communities by:

- Investing the equivalent of an extra £5m into our network of Community Champions, increasing their roles to full time or 20 hours a week.
- Committed to donate £15m worth of products to local food banks as well as developing innovative ways for customers to support local and national food poverty charities.
- Introduced our Doorstep Delivery Service, a priority telephone line for elderly, vulnerable and isolating customers to order shopping with next day delivery.
- Supported key fundraising initiatives including donating £100,000 to Age UK's COVID Appeal, raising over £200,000 for NHS Charities Together and donating £25,000 to domestic abuse charity Refuge. We also set up a ringfenced £500,000 fund for homeless charities through our Morrisons Foundation.



Our Charity Strategy



Supporting good causes across our local and national communities is at the heart of our business. Our charity strategy is made up of four pillars.

Main Partnership

Our award winning national partnership is something we're very proud of. So far we've raised £15m for CLIC Sargent since our partnership began in February 2017, to support a range of services and grants for young people facing cancer and their families.

Strategic Partnerships

Strategic partnerships with other charities enable us to support key events and campaigns throughout the year that are important to colleagues and customers on a national scale, whilst not cutting across the support we provide for the main partner.

For example, in 2020 we raised:

Trussell Trust - £200k
Daffodil Appeal - £750k
Poppy Appeal - £1.25m
Children In Need - £65k

Morrisons Foundation

Since its launch in 2015, the Foundation has supported over 2,500 registered charities with over £30m donated in grants and matched funding. In 2020:

- £3m donated to support charities make a positive difference in local communities in England, Scotland and Wales.
- £228k donated to support charities that Morrisons colleagues fundraise for.

Local Fundraising

Our network of Community Champions across all our stores and sites work to ensure we are truly integrated into the communities we serve. They are empowered to raise money for local causes that matter to colleagues and customers. This could either be through providing fundraising opportunities in store, which generates around £7m for local charities each year.

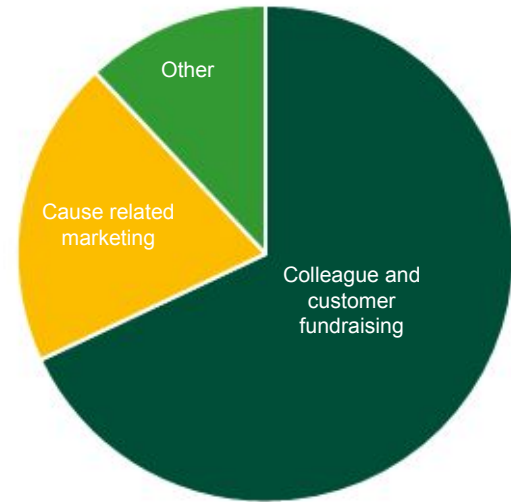
Or by organising their own fundraising activities, individually or in clusters.

More About Our Main Partnership



Morrisons has a long history of supporting great causes through our main charity partnership. We raised £7.1m for Save the Children between 2011 and 2014 and £7.3m for Sue Ryder between 2014 and 2017. Our current partnership with CLIC Sargent was targeted to raise £10m over three years, but was extended due to the overwhelming support our colleagues and customers showed for the cause and to mitigate the effects of the pandemic on our fundraising activities.

Now in its fifth and final year, our awarding-winning partnership with CLIC Sargent has raised £15 million. Most of the money we raise comes from colleague-led fundraising activity across our stores, sites and offices including collections, fundraising events and bespoke challenges. The other main source of fundraising is our Every Pack Gives Back cause-related-marketing programme, working with a range of products and brands.



The Process



As our partnership with CLIC Sargent comes to end, we're excited to begin the process of finding our next charity partner. Our next partnership will last for 3 years, from 30th January 2022 to 30th January 2025.

24th May to 20th June	The window for applications is open. Please use the form on page seven.
June	All applications are reviewed against the criteria.
July	Consultation with key stakeholders across our business will create a shortlist of 10 charities.
August	Consultation with network of Community Champions to reduce shortlist to five charities.
September	The final short list of five charities will be invited to present to a panel of Morrisons colleagues from across the business, including colleagues from our stores and sites. The panel selects two charities to move forward to colleague vote.
October	Colleague vote open for a period of two weeks.
November	Charities are notified of the outcome.

Guidance on Applications



Qualifying Criteria

To be considered, charities must:

- Be registered as a charity in England & Wales and in Scotland
- Operate and deliver services in England, Scotland and Wales

Charities should be able to demonstrate:

- They deliver services or projects on a national scale, but with strong relevance to local communities
- Their cause and brand resonates with colleagues and customers in all Morrisons locations
- They have experience of delivering dynamic fundraising and communications campaigns, tailored to suit the needs of individual corporate partners
- They are able to provide excellent support to colleagues across all levels of Morrisons, including a dedicated account management team
- They understand Morrisons as a business, our key opportunities and challenges when engaging our colleagues and customers on charitable giving

The money we raise

Traditionally, our partnership fundraising has been 100% restricted to new projects and services. However, we recognise the situation many charities are facing following a significant reduction in income during the pandemic.

As such, fundraising from our 2022-2025 partnership will be 50% restricted to a new project or service, and 50% restricted to existing core services.

Application Process - Part 1



Please submit your initial application using this [google form](#).

You will be asked to enter some basic details about your charity and the work you do.

- Charity Details
 - Name
 - Registration Details
 - Elevator Pitch
- Applicant Details
- About Your Income
 - 2020-21 Total
 - Individual Giving
 - Events & Challenges
 - Philanthropy
 - Retail
 - Corporate Partnerships
- About Your Expenditure
 - 2020-21 Total
 - Charitable Activities
 - Raising Funds
- About Your People
 - Number of employees
 - Number of supporters
 - Number of volunteers (including fundraising volunteers)
- Are you currently working at a national level with any other supermarkets or retailers? If yes, please provide details
- Are you registered with the Gambling Commission and do you hold a lottery operating licence?

Application Process - Part 2



You should then send **one PDF document** in support of your application to charity@morrisonsplc.co.uk

This can be formatted however you wish, but the content must cover the points below and consist of **no more than 4 pages**

About Your Charity

What does your charity do? *Tell us about the services you offer, the projects you deliver and the people you help.*

What difference have you made in the last three years? *Tell us about the overall impact you have made; and about major projects and what they delivered.*

What are your strategic aims over the next three years?

Tell us where you see your charity, what you hope to achieve and how this is different to now.

Working with Morrisons

How will you engage colleagues and customers throughout the partnership? *Tell us the types of events and campaigns you'd like to see us deliver together, give an example of a great fundraising idea that would work for our business, tell us your plans for digital fundraising and engagement*

How will you ensure our partnership reaches as many colleagues as possible? *Tell us how you can communicate with colleagues, and support them in their fundraising. In particular, how can you make our partnership relevant to the communities we serve?*

How will you manage the partnership? *Tell us about your account management structure, and how this will apply to Morrisons (including how many full time employees you would assign to delivering the partnership).*

Our Partnership

Our partnership is raising on average £3.5m a year. What would you spend this money on? *Keep in mind that that 50% is restricted to a new project and 50% is restricted to core services.*

Why is it important this project or service is delivered?

Tell us the short and long term impact it will have, who it will benefit and the geographical relevance. What will the legacy be?

How will you measure the impact of the project or service?

Tell us about any evaluation methods or KPIs you could employ.

Your Experience

Please provide an overview of your experience working with a high profile corporate partner? *Tell us how much you raised, how you delivered the partnership and what you achieved. Include if you've delivered cause related marketing activities.*

What experience do you have in engaging customers in corporate partnerships as well as colleagues? *Tell us about how customers got involved in your previous partnerships, and how you made it relevant to them.*

What experience do you have in delivering large communication plans or awareness campaigns? *Tell us about plans/campaigns you have delivered to a large audience, over a number of locations, using internal and external channels.*