

EXPERIENCE A COMMUNITY FIELD TRIP™

A first-hand perspective on issues important to you.



OVERVIEW

A Community Field Trip™ provides UHNW/HNW individuals and families the opportunity to learn first-hand about an issue affecting their community. Groups engage with nonprofits relevant to their issue area of interest, attend a site visit, and gain insight from nonprofit leaders about their work. The result is...

- An intimate perspective on the impact of this issue on their community
- A deeper understanding of how organizations are addressing an issue
- More insight on how to assess the impact of their grant
- Inspiration, motivation, and confidence in their philanthropic journey

WHO SHOULD ATTEND?

UHNW/HNW Individuals and families who...

- Have a foundation, DAF, or other charitable vehicle and are interested in an issue
- Are active or want to be more active in their family's giving
- Younger family members who want to start finding their own voice in philanthropy
- Parents who want to instill values in their children and want an opportunity for a discussion

THE VALUE FOR ADVISORS

As a trusted advisor, you play a pivotal role in helping to facilitate your clients' philanthropic commitments. Beyond strengthening relationships with clients, you can showcase the firm's dedication to issues in the community and share your involvement on social media, in client newsletters, and on the company website.

WHY STRATEGIC PHILANTHROPY, LTD.?

With over 20 years of expertise in issue framing and identifying impactful organizations, our team offers a wealth of knowledge and experience. We meticulously research and vet organizations, ensuring a solid foundation for our

discussions, while remaining unbiased in our approach. Our goal is to provide insightful, objective perspectives on transformative efforts and foster open, supportive relationships with community partners. With SP, you get access to our network and expertise and a seamless and inspiring experience for your clients.

TWO OPTIONS FOR COMMUNITY FIELD TRIPS

FULLY CURATED BY SP

We expertly lead your event in a selected issue area. After consulting with you about goals, we choose suitable nonprofits, curate presentations, and plan the event. We schedule periodic updates to keep you apprised of progress and decisions. Our team creates copy for your marketing team to design an invitation and event materials.

CUSTOM EVENT

You can suggest nonprofits to be vetted in the issue area of your choosing and communication is more frequent to facilitate your expanded involvement in the process. We strategically incorporate your team’s expertise or specific interests into the program. Copy for marketing materials is provided as in our curated process above.

FEE INFORMATION

FULLY CURATED Event	
\$4,000	Research and Planning
\$1,750	Donations to each NPO (\$500 for each + \$250 extra for host NPO)
CUSTOM Event	
\$6,000	Research, Planning, and Expanded Client Engagement
\$1,750	Donations to each NPO (\$500 for each + \$250 extra for host NPO)

Other Required Expenses:

- SP Consultant Travel – 2 days initial site visits and 1 day to run event
- Event Insurance – can be purchased through your existing insurance provider

Sample of Experiential Expenses (as desired by the client):

- Event transportation for guests
- Rental fee for a gathering space
- Food & beverages for a breakfast, lunch or a post-event gathering
- Gifts for guests

TIMING OF EVENT *(Holidays, seasons, etc. may impact the timing of an event.)*

Fully Curated Event: A minimum of 4.5 months of planning time *after* the signed contract.

Custom Event: A minimum of 6 months planning time after signed contract.

To begin work on your Community Field Trip™, a 50% initial payment is required.

OUR GENERAL TASK LIST FOR A COMMUNITY FIELD TRIP™

PLANNING	
	Choose Issue Area (your firm) <u>Fully Curated Event</u> : Choose from either food insecurity/waste or child/youth development <u>Custom Event</u> : Suggest an issue area of your choice; nominate up to 2 nonprofits to include in vetting process within the first 2 weeks of research
	Length of event <u>Fully Curated Event</u> : Up to 4.5 hours exclusive of transport to and from site visit <u>Custom Event</u> : Up to 6 hours exclusive of transport to and from site visit
	Create project timeline
	Issue Area Research
	Identify nonprofit site visits and participation for Field Trip
	Conduct site visits
	Develop event agenda
	Provide event copy to the firm for marketing/invitations
	Source food and drink
	Source Thank You gifts – optional
AT THE EVENT	
	Pre-event huddle (day before)
	Assist in running the event on-site
	Session to frame the event in terms of guests’ philanthropy goals
	Facilitation of event
	Final session to de-brief
POST-EVENT	
	Make non-profit donations (your firm)
	Free 1-hour consultation for client guests with Strategic Philanthropy Ltd
	Post-event brief with your staff

FOR MORE INFORMATION

Contact Maryann Fernandez, Managing Director at maryann@stratphilanthropy.com

SAMPLE EVENT AGENDA

ACCESSING NUTRITIOUS FOOD IN DISINVESTED COMMUNITIES

(note: names of organizations and places have been anonymized to provide a general sense of the event rather than emphasize location or specific organizations)



ORGANIZATIONS

- **Local Community Farm** - non-profit urban farm and landscaping service established in 2016 in the Channel Gardens neighborhood. We work to increase access of local organic produce through farmers markets, pop-ups, delivery, and our local foods co-op.
- **New Horizons Church** - food pantry and distribution
- **Farmers Share** - utilizing EBT to access nutritious produce

AGENDA

12:30 pm	Depart firm offices for Local Community Farm
1:00 pm	Arrive at Local Community Farm
1:15 pm	Framing the opportunity: Making the most of your site visits and discussions
1:30 pm	Overview of food insecurity and access to nutritious food: A community-led, grassroots approach to food insecurity
2:15 pm	Tour of gardens and warehouse
3:00 pm	Tour of New Horizons Church food pantry + meet beneficiaries
3:30 pm	Refreshments
3:45 pm	Panel discussion: Considerations for funding food insecurity and access to nutritious food All nonprofits plus special guest from the Lorenzo Family Foundation
4:15 pm	Group debrief
4:45 pm	Depart Local Community Farm
5:30 pm	Arrive at firm offices

“Thank you so much for the [site visits] yesterday. I had such a great experience and went home last night, and came back to work today, with renewed energy...I learned so much about our target organizations. I would love to do it again – anytime.” – single family office executive participant