

Presentation to Person to Person's Leadership Team

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Strategy and Approach to Cultivating Mary

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Getting to know Mary – her values, motivations, interests

*Seek first to Understand, not to be understood because **Giving is Personal***

WHY

Research:

- Review database on Mary's giving history, motivations, frequency and pattern of her giving to P2P
- Ascertain which campaigns, if any she has responded to and if she has a
- Review publicly available data (i.e. google and social media) to obtain additional information that provides insights about Mary, her family, her activities, interests and philanthropy outside of P2P

Consult:

- Board Trustee – Cara to learn about their relationship and to get more nuanced information about Mary, her motivations and interests. Try to ascertain from the conversation how best to approach Mary about potentially increasing her support at a higher level
- P2P leadership and program team members who have met with and cultivated Mary and determine, for example, if Mary has a particular interest in a certain program or aspect of P2P

Strategize:

- With the development and program team in preparation for the meeting to:
 - Gain information/perspectives on the best ways to deepen cultivation efforts with Mary
 - Learn what communications methods that have historically been used to engage her
 - Determine which events and activities she has attended; also, if she has volunteered or participated in a giving campaign
 - Strategize ways to strengthen the relationship with P2P and better communicate what we are doing in a way that aligns with Mary's interests
- Engage with P2P leadership to test certain thinking and direction about deepening our engagement with Mary and other donors like her to increase their giving and volunteerism to further support P2P's growth and impact

Meeting Mary: Establishing a relationship with her that's relevant to the results she'd like to see and the impact that inspires her philanthropy

WHO AND WHAT

- 1) **Build rapport that is relational not transactional** – *focus on being interested in her; less on being interesting*
 - **Thank Mary** for her generous and continued support to P2P
 - **Briefly share** how through her valuable partnership, P2P's programs are being achieved and sustained
 - **Actively listen** by asking open ended questions that encourages her to share her story of who she is; b) how she first learned of P2P; c) what about the mission of the organization motivates her giving; d) see if there are part(s) of our mission that are of particular interest and why; and finally, e) what is her current and/or desired level of involvement in P2P's volunteer activities/events
- 2) **Share updates** on current initiatives that P2P has successfully undertaken over the past several months **and inform** her about new opportunities and ways that her support amplifies impact
- 3) **Make a soft ask** - see if Mary has an appetite for increasing her donation to P2P; discuss how her generous gifts are addressing critical needs; **provide an overview** of activities or events coming up and invite her to attend and to consider inviting friends
- 4) **Agree on next actionable steps: determine** when next we can follow-up with her; **confirm** how she prefers to receive info + institutional updates on initiatives P2P is working on; **identify** which programs Mary may have particular interest in learning more about; **share** a human-interest story that aligns with her interest and provides metrics of what we're achieving through her support

The HOW: Developing a Plan of Action that Focuses on Enhancing, Increasing, Advancing and Amplifying Mary's Giving

1.

Debrief

- ❑ Debrief with Trustee - Cara, Nancy and other leadership team members on the meeting
- ❑ Brainstorm ways to enhance our cultivation strategy that deepens Mary's engagement with us

2.

Follow-up – Communication and Engagement

- ❑ Write a personalized, hand-written note to Mary OR send an email if she indicates that platform as her preferred way of communication
- ❑ Follow-up with an invitation to any P2P upcoming event; and follow-up on donation if commitment was made

3.

Develop a Work Plan

- ❑ Update database with the notes from the meeting highlighting salient points, questions or concerns raised and agreements made
- ❑ Work with Dev Team to develop a work plan that outlines the tasks, responsibilities and timelines for further cultivation and stewardship with Mary

4.

Enhance cultivation thru timely and consistent follow-up

- ❑ Schedule follow-up meetings (by phone or in person) with Mary; include relevant members of the team to keep Mary informed and engaged
- ❑ Implement mid-long term cultivation strategy that with time could include multi-year pledges, legacy giving

Proposed Long term cultivation strategy that can build resonance, long-term engagement and new partnerships

1. Create Annual Fund Strategy that outlines a clear plan of action focused on **building more resonance of P2P's work and impact with new audiences**, specifically corporate and HNI's in Fairfield County.
2. **Organize small donor learning events and other donor sponsored events that increases their interest and engagement and that showcases** how P2P is a viable partner for corporate and individual fundraising schemes but may not be well known outside of the food, toy and clothing donation space.
3. Focus on increasing messaging that discusses how P2P transforms lives and that enables **people (community members, small businesses and corporations) to see themselves as a fundamental part of the work that P2P does and the need to continue the drive to reduce food insecurity and greater pathways for increased economic mobility.**
4. Brainstorm with leadership **a vision for the future that trials new types of partnerships and collaborations with organizations either working directly on P2Ps core issues or working thematically on issues that may include the climate crisis, homelessness or women's health**

Key goal is to continue working to find **common ground that move more people towards us**, create **proof points of impact: how inputs drive outputs and impact we're making**. Find new and innovative ways to **demonstrate social return on donor's investment...positive impact on people and communities**. Keeping firm on core principles; find ways to unlock new funding