

EPIP Initial Discovery Findings: Executive Summary

Emerging Practitioners in Philanthropy (EPIP) is undergoing strategic planning to better understand the role it might play in the future of the philanthropic field. Over the past two months, the strategic planning consultants spoke with 26 EPIP stakeholders, including current and past staff and board members, funders, institution members, and field leaders. In addition, the team solicited input and perspectives from chapter leaders and current EPIP members at EPIP's 2016 National Conference (9/14/16-9/15/16) and Chapter Leader Gathering (9/13/16) in Baltimore. Below is a summary of key perspectives that emerged from this initial discovery process.

The Need

While many talented, diverse and passionate young professionals enter philanthropy, a number of challenges within foundations - such as structural barriers, slow pace of change, lack of diversity at highest levels of leadership and a culture of elitism - contribute to feelings of isolation, frustration and disillusionment, according to individual respondents' experiences. This suggests that the sector ends up losing intelligent, motivated and inspired leaders ready to make change but feel they are unable to apply their talents and energy to do so when they encounter limited room for growth, risk-aversion, and practices that undermine or slow progress on issues they care about. At a time when philanthropy itself is changing and evolving its funding models to better support social change, and when racial, social and political tensions are top-of-mind in the national consciousness, the field needs, now perhaps more than ever, to retain dedicated and diverse practitioners who share a common power analysis and commitment to equity and social justice.

EPIP's Potential Role

Stakeholders were asked about EPIP's potential role and trajectory in addressing these needs, and a number of the suggestions provided - through interviews as well as conference activities - primarily fell within two areas: 1) **cultivating diverse talent** through professional and leadership development resources and 2) serving as a **platform for advocacy and influence** for changing practice in the field. Furthermore, stakeholders also described the opportunity for EPIP to expand its influence by exploring its role within the broader ecosystem of affinity groups and others working with philanthropy. Initial suggestions are outlined below.

● Cultivate Diverse Talent

EPIP members have a wealth of lived experience to bring to bear on the sector's most pressing challenges, and EPIP could support them in leveraging it for change. By focusing on the pains and frustrations members have shared that often hold them back, and shaping strategies that not only address those but also give members space and platforms to practice their leadership skills, EPIP can help support members as leaders who honor lived experiences. If members (particularly those who are newer to the sector) are still finding their voice in their roles, one area of growth might be creating **more experiential learning spaces** for members to practice speaking and acting from their own lived knowledge.

EPIP could provide a continuum (entry level to advanced) of professional development, mentorship and leadership development opportunities. Numerous stakeholders mentioned valuing the opportunities EPIP has provided and if anything wanting further depth as members gain more experience. By providing a continuum of support, EPIP can support leaders throughout their journeys rather than only at the outset.

EPIP would benefit from even further developing connections and relationships with mid-to-senior level leaders. Particularly given a lack of accountability in philanthropy, change will likely require the buy-in of institutional leaders. Some interviewees mentioned the value of building more relationships with mid-to-senior level managers in institutions both to better support emerging leaders and also to serve as allies for change.

For EPIP members who aspire to lead but may have limited opportunities in their workplace, EPIP could evolve even more to be a space to practice leadership. For example, while the conference currently provides opportunities to listen to seasoned leaders in salons and panels, designing workshops to shift the power dynamic and elevate the attendees' perspectives and lived experiences may support leadership that is inclusive, participatory, and facilitative - rather than a traditional "expert" vs. "attendee" dynamic.

- **Serve as a Platform for Activism and Influence**

Utilize EPIP's network for research and knowledge building. EPIP's membership represents an interesting and highly relevant cross-section of philanthropic and other social change professionals. Using the network to support knowledge building could help influence change in the broader field.

Lean on EPIP's network to 'stay ahead' of the work as grantmakers. Multiple interviewees mentioned the often slow pace of change in philanthropy. Affinity groups can help individuals understand trends in the field and stay connected to others doing the work, helping them 'stay ahead' and be more responsive.

Elevate the voice of young people in philanthropy. Young people (under 40) have traditionally been EPIP's target population; and while some interviewees recommended expanding reach, others highlighted the role EPIP could play in elevating the voices of younger generations who often are excluded from decision making.

Utilize strategic campaigns to rally EPIP's network to push for specific cultural and structural changes. A number of ideas that emerged at the conference as well as in interviews have to do with leveraging EPIP's network to support specific institution-level changes that would not only change the climate for the professionals who work in those institutions, but that could potentially set an example for grantees and others as well.

- **Build the Field through Partnerships with Similar Groups**

There are a range of other affinity groups or similarly-focused organizations that exist in the field, and stakeholders suggested that EPIP consider how to position itself alongside those groups and/or engage in shared efforts together. Being strategic in cultivating those relationships could not only create a stronger network for EPIP members, but also build a stronger base of practitioners in the field who share common values and are connected to a range of resources as they navigate philanthropy.

EPIP might leverage its position as an organization in philanthropy with both white members and people of color to provide 'cover' - whether for its own members or for other affinity groups. EPIP occupies a unique space as a broad-based membership organization. This may come as both an asset and a liability. Some might consider EPIP, with its lack of diversity in staffing, less credible on issues such as equity and social justice. Yet others have noted the potential for the same characteristics to be assets: Some people may listen to EPIP's voice at times when they might not be as open to messages from affinity groups that seem more distant to them.

If EPIP seeks to effect institution- and field-level change with its size and resources, it will likely see more success by narrowing a specific set of activities that it is well positioned to implement given its assets and competencies. By focusing on doing well in those areas, EPIP will likely see change sooner and be able to adjust or scale efforts accordingly.

As a network, and in conversation with other networks, EPIP has a unique opportunity to support sector-wide responses to specific, charged events in communities. Exploring the ways the network may be used for distribution of information and resources, as well as to rally support in times of need, may ultimately lead to an avenue through which EPIP could influence sector-wide results.