

**Measuring a Leader: Brown Bag Discussion on Strategic and Analytical Skills**

A brown bag discussion is an easy way to bring together local chapter members and other colleagues. How to organize one:

§Utilize conference space at your organization

§Create an Eventbrite for the event (click [here](https://drive.google.com/a/epip.org/file/d/0B7VaQurb8TIrd0hLV3lKMF9SVzA/view?usp=sharing) for instructions)

§Invite chapter members and local nonprofit/philanthropy colleagues

**Goals**

* Stimulate discussion and reflection among emerging leaders about their experiences with Strategic and Analytical skills
* Exchange tips, ideas, and resources for strengthening and practicing Strategic and Analytical skills

**Materials**

* Discussion questions (see sample questions below)
* Discussion Feedback form

**Leadership Roles**

* Facilitator
  + New to facilitation? Check out these facilitator guides:
    - [Facilitation: Tools of the Trade](http://www.epip.org/2014/12/webinar-recap-facilitation-tools-of-the-trade/) (Materials from one of our Wednesday Webinars)
    - [The Art of Facilitation, by National Community Development Institute](https://drive.google.com/a/epip.org/file/d/0B6lW6vMybwzwRHVOWVU0Y1VFV0k/edit?usp=sharing)
    - [Developing Facilitation Skills, from The Community Toolbox by the University of Kansas](http://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main)
* Reporter
  + Using the Discussion Feedback form, the reporter takes notes to share with the group and with EPIP National. By reviewing the Discussion Reportback, EPIP National can stay current on what matters to our members and connect you to follow-up resources.

**Program Structure**

A suggested agenda for a 1 hour brown bag might be:

1. Settling in and introductions: 15 minutes
2. Discussion (see sample questions below): 40 minutes
3. Wrap up/fill out Discussion Reportback form: 5 minutes

Depending on how much time you have, smaller groups (under 10)--can have the discussion within the whole group. If the group is larger, consider dividing up into smaller groups for the main discussion and concluding with report-backs to the large group

**Sample Discussion Questions (For a 40 minute discussion, choose 3-5 questions)**

Measuring a Leader describes Strategic and Analytical skills as the ability to

• anticipate future needs and trends  
• create competitive strategies and plans  
• think broadly when analyzing an issue or presented with a challenge

Some of the ways that you can demonstrate these skills include:  
• [writing on future trends in philanthropy or issues of interest](http://www.epip.org/2014/02/transparency-inclusion-and-collaboration-three-ways-philanthropy-can-take-its-own-medicine/" \t "_blank)  
• [sharing examples of strategic plans they have created at work or in their volunteerism](http://www.epip.org/?p=75943)  
• [highlighting a list of publications they regularly read on issues impacting the field](http://philanthropy.com/section/Home/172)

1. At this point in your professional life, what are the opportunities for developing these skills? What are the barriers?
2. How have you demonstrated these skills? Which do you feel most comfortable with? Which do want to develop more?
3. How do you stay knowledgeable about your field?
4. Have you gone through a strategic planning process? If so, what was it like? What happened? If you haven’t gone through a strategic planning process, have you gone through some other planning process?
5. For most emerging professionals, many of your day-to-day responsibilities focus on more detail-oriented work. But in order to advance in your field, you have to develop the ability to think and work at the big-picture level. How do you do that?
6. ***Local chapter:*** What programs or activities has our EPIP local chapter organized that relate to Strategic and Analytical skills? What programs or activities can we organize related to these skills?

**DISCUSSION FEEDBACK FORM** (please email a completed form to your regional coordinator and Michael Barham-michael@epip.org)

* Date/duration/topic of discussion
* Who were the facilitator and recorder?
* How many people attended?
* Please provide a brief description/breakdown of who was in the room: E.g., chapter members, steering committee members, non-EPIPers, younger/entry-level (program assistants, program associates, etc), mid-level (program officers, program managers, program directors), senior (senior directors, etc)
* What were the main discussion points?
* Key takeaways?
* What resources were mentioned in the discussion?
* Any followup discussions or programs planned? Any lingering questions?
* Any comments or suggestions for future discussion guides?