



## Emerging Practitioners in Philanthropy

### Measuring a Leader: Brown Bag Discussion on Influencing and Fundraising 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
- § Invite chapter members and local nonprofit/philanthropy colleagues

### Goals

- Stimulate discussion and reflection among emerging leaders about their experiences with influencing and fundraising skills ( e.g., inspiring and influencing others, influencing funding partners to join collaborative projects, raising resources for community organizations they support, etc.)
- Exchange tips, ideas, and resources for strengthening and practicing influencing and fundraising skills

### Materials

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

### Leadership Roles

- Facilitator
  - New to facilitation? Check out these facilitator guides:
    - [The Art of Facilitation, by National Community Development Institute](#)
    - [Developing Facilitation Skills, from The Community Toolbox by the University of Kansas](#)
    - Also, sign up for our 12/3/14 webinar "[Facilitation: Tools of the Trade](#)" (free for EPIP members!)
- 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)**

- How are you developing these skills currently? For example, one might develop or demonstrate their skills by:
  - [securing co-investment from funding partners](#)
  - [soliciting voluntarily for funds in support of community organizations](#)
  - [creating projects that are cross-organization collaborations](#)
- What specific resources have you found helpful for developing your influencing and/or fundraising skills? (Names of groups, books, classes, other resources)
- What other skills would you add under Influencing and Fundraising? Why?
- What does it mean to inspire and influence others?
- What are key considerations for approaching a potential funding partner?
- What are key considerations you think about before deciding whether to join a collaborative project?
- What should you know about an organization before asking for money?
- Think about someone you admire as a great influencer or fundraiser. What makes them great--what gives their voice power?
- Is "fundraising" a dirty word? Why or why not?
- Does fundraising need new language?
- What are some of the new ways to think about development work?
- Some grantmakers previously worked in development. Some people who work in development previously worked as grantmakers. Their experiences on the "other side of the table" can prove valuable in their new work. If you are a currently a grantmaker, what do you think development staff need to know? If you are currently working in development, what do you think grantmakers need to know?
- **Local chapter:** What programs or activities has our EPIP local chapter organized that relate to influencing and/or fundraising 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?