



Emerging Practitioners in Philanthropy

Measuring a Leader Peer Case Study Exercise: Influencing and Fundraising

This 30-45 minute group activity is a way for people to share about a challenge and receive support from their peers. This activity works best in groups where there is trust already established and the understanding that confidentiality will be preserved. The process is as follows:

- 1) The person presenting the case study has 10-15 minutes to share with the group. He or she can use the “Guide for Case Study Presenters.”
- 2) The group then has 20-30 minutes to discuss and share feedback. They can use the “Group Discussion Guide”
- 3) At the end of the exercise, please complete and share the Peer Case Study Feedback Form with Michael Barham, michael@epip.org. Your feedback will help EPIP National stay current on what matters to our members and connect you to follow-up resources.

Materials

- Copies of small group discussion guide
- Presenter-prepared case study outline
- Chart paper
- Markers
- Feedback form

Guide for Case Study Presenters

Thank you for agreeing to present a case for this exercise. You will have 10 minutes to present the necessary information needed for the exercise. Please use the following questions as a guide when presenting your challenge to the group.

1. What is the nature of your influencing/fundraising challenge? Consider, for example, issues related to any of the following:
 - inspiring and influencing others
 - influencing funding partners to join collaborative projects
 - raising resources for community organizations they support
2. Please give a brief background.
3. Who are the key people involved? Please describe their roles in the project.

4. What have you already tried?
5. What worked and did not? Why?
6. What is at stake if this challenge does not get resolved?
7. Are there people outside your organization who may be helpful?

Group Discussion Guide

1. What are the primary issues in this case?
2. Where are the opportunities to maximize the case study presenter's positive impact on that challenge?
3. What would be the most effective first steps to take advantage of the above opportunities?
4. Who needs to be involved? Why and how?
5. What kinds of outside support would be helpful to this individual/organization? Please be specific.

PEER CASE STUDY 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 peer case study guides?

