



**Emerging Practitioners
in Philanthropy**

Strategic Plan

2017-2020+

Approved Plan (4/4/17)

I. Background and Context

In our civil society, philanthropy has both outsized influence and extraordinary potential. With just a fraction of the money available to the public and private sectors, philanthropy has helped to seed life-changing innovations and support movements for equity and social justice. From America's library and 911 systems, to Civil Rights and the Movement for Black Lives, institutions of all stripes have left an indelible imprint on our history.

Our field today finds itself in a moment of self-examination and renewal. In recent years, leading foundations have sought to both deepen their leadership for equity and social justice while bringing those values more deeply into their internal operations. The term "diversity, equity and inclusion" has become mainstream in philanthropy, and the debate is no longer whether it matters but rather how best to implement it. Our current political environment makes these questions all the more timely and pressing.

For 15 years, EPIP has provided space for thousands of emerging leaders in philanthropy to learn the field, hone their leadership, and find a path forward in social change work. EPIP members represent today the diversity we want to see leading the field: 45 percent of our members identify as people of color, 65 percent as women and eight percent as LGBTQ. Members bring tremendous passion, talent, insight and lived experience to their work, and deeply value the community they have found in EPIP. Many have gone on to become effective and influential executives, innovators and advocates for equity. We are proud of this legacy and remain committed to playing this role in the field.

In light of the times, we feel called upon both to deepen our work and broaden our vision. In the strategy we lay out below, we seek to support and mobilize our members in new ways in order to strengthen the sector and embolden our collective leadership in defense of the communities we support and our shared values.

Our Evolution

EPIP's last strategic plan covered the years 2010 to 2012, and primarily focused on improving our role as a professional and leadership development organization. Now, in 2017, we call ourselves to higher action. From now through 2020, EPIP plans to grow into a community that:

- Deepens our work to develop rising talent and promote excellence in the sector;
- Promotes innovation and effective practices -- and when necessary speaks hard truths -- to support the success of our members and other diverse changemakers; and,
- Helps move our sector into deeper leadership for equity and social justice.

This plan lays out a long-term vision for our community and our field that lasts beyond the span of this three to five year plan. We consider this plan a "living document," flexible as we embark on new activities and learn from them. It is our intent to grow into this vision using an agile

approach driven primarily by our community of emerging leaders, partners, champions and allies -- what we will refer to in this plan as “The EPIP Community.” It might be fair to say that this document represents more of a framework for community action than a traditional strategic plan.

Below we further describe our vision and outline our intended outcomes and core strategies for getting there. We invite you to share your reactions and discuss how we can partner with you to advance this vision.

Our Methodology

The strategic planning process has centered the experiences of the EPIP community in the redesign of EPIP’s Mission, Vision, Values, and Theory of Change. Throughout each stage of planning, the facilitation team engaged a variety of EPIP stakeholders, including individual and institutional EPIP members, chapter leaders, alumni, partners, and board members, in the design process.

In keeping with our desire as an organization to support a more inclusive sector, the facilitation team utilized numerous methods -- some traditional, some not-so-traditional -- to engage the EPIP community in co-designing this strategy. These methods included:

- 1:1 interviews with a wide range of our stakeholders and field leaders;
- Moderated group discussions at chapter and board levels;
- A design workshop for chapter leaders utilizing design-thinking principles;
- A “Gallery Walk” at the 2016 National EPIP Conference prompting attendees to share and “up-vote” their ideas about leadership and their experiences in the sector;
- Town hall webinars and small-group virtual sessions to keep the EPIP community in the loop and get real-time feedback as the plan has developed; and,
- Use of platforms like Google Docs to “crowdsource” edits on the plan’s components.

The strategic plan process was facilitated with the support of external consultants, board members, and staff. When we refer to the “facilitation team,” this most directly includes consultants Christi Tran of Guanabana Consulting and Frances Tompkins of Together Brave; our Executive Director, Tamir Novotny; and Caitlin Fisher, Vice Chair of EPIP’s Advisory Board and Chair of the Board’s Strategies and Initiatives Committee. While this facilitation team guided the strategic planning process and drafted this plan, the content you see here has been shaped by members of our broader community all along the way.

Key Learnings Informing this Strategy

During the early, “discovery” phase of the process, the strategic plan facilitation team heard a range of ideas about both EPIP and the field of philanthropy more broadly that has implications for our organization’s strategy.

- **Our field has many talented, diverse rising leaders who believe in philanthropy’s power to build a better, more equitable world.** Our members described joining the field because of the desire to harness philanthropic resources to build a more just, equitable and sustainable world. Many value the big-picture thinking, access to partners and opportunities to exert influence as additional draws. Many members, current and former, are taking bold leadership in philanthropy today, at times risking their standing or perhaps even their careers to do so.
- **While our field wrestles with how to bring in diverse executive talent, some members have shared experiences that they feel push them out.** Many of our members told the facilitation team that they feel unable to ask questions, express concerns or take on what they see as role-appropriate leadership within their institutions without fear of reprisal. This can be a result of cultural and structural barriers within institutions, a lack of mastery of the unwritten rules of philanthropic leadership, or both.
- **Members also expressed concerns about practices that undermine their personal and, where applicable, their institutions’ commitment to diversity, equity and inclusion.** These include the assumption that philanthropy, rather than communities, has the answers to social ills; an “internal center of gravity” that places foundations’ concerns ahead of community needs; and implicit biases that come out in grantmaking. Our members are not alone in observing these, but on account of their identities and a relative lack of power, they may feel them more acutely than others.
- **Many in the EPIP community are hungry for our organization to adopt a national charge that harnesses members’ collective power and potential to move our sector forward.** Some institutional members, for example, see EPIP as a tool to help “shake up” the cultures of their own institutions, or to carry messages that they have been unable to convey themselves. Others, like our chapter leaders, believe that they can be more impactful if EPIP’s infrastructure can better connect the different constituencies in the EPIP community.
- **Most stakeholders agree that EPIP’s target audience should prioritize young professionals and those new to the sector, but also emphasize the importance of engaging senior leaders.** Many believe that EPIP best holds space for young (as well as older) professionals who are relatively new to philanthropy. At the same time, a number of our stakeholders noted EPIP’s long-standing commitment to multi-generational dialogue, as well as the importance of buy-in at senior leadership levels in order to advance change. In this way, EPIP could be a space for those who are hungry to take a fresh look at philanthropy and contribute toward shared goals.
- **Stakeholders value EPIP as a safe space to be among like minded people, have tough conversations, and develop greater voice.** Time and again, the facilitation team heard how coming to EPIP helped members as professionals to find people like themselves, who share their views about social justice, equity, and the field of

philanthropy. Both our individual and institutional members highlighted the informal network building function as a key benefit of EPIP.

- **Stakeholders also deeply value the professional development component of EPIP’s work, even while many are also interested in organizing and advocacy.** Both our individual and institutional members highlighted the importance of EPIP’s leadership and professional development work. Some also described how that component can and should support members’ ability to have influence. For instance, one stakeholder discussed how, as a person of color, “in order to be acceptable, you have to be exceptional.” Professional development, in that sense, becomes a prerequisite for many practitioners to be able to lead within their institutions and be heard.
- **Numerous stakeholders also noted how greater capacity would enable EPIP to provide more support both nationally, and on the local level to our chapters.** As our chapter leaders volunteer time, or use some of their work time to help coordinate for EPIP, making the process as smooth and easy as possible supports them to be able to dedicate their efforts and resources more effectively. Many stakeholders also shared a desire for EPIP to have a greater geographic reach.
- **EPIP should not duplicate, but rather should partner with, other organizations who are better positioned to advance specific parts of our expanded agenda.** For example, EPIP is already in coalition with CHANGE Philanthropy, which works to bridge funders with marginalized communities. In this coalition, we work to bring information and opportunities back to our members, as well as to lend our community’s voice to CHANGE’s agenda. We see this as a potential model for our approach to partnerships.

The facilitation team shared findings with the Board of Advisors throughout the fall and winter. With these implications in mind, the team worked to draft portions of the strategy (such as Vision, Mission, Values and the Theory of Change) before sharing publicly with the broader EPIP community for input and revisions. After integrating feedback from our member community and other stakeholders, EPIP arrived at this strategic plan for the next 3-5 years.

Who Does EPIP Serve?

Because of our name and the perception that we work only with philanthropic professionals under age 40, we’re often asked, “Who is EPIP for?” With this new strategic plan, we intentionally seek to grow our community of practitioners, and we strive to be inclusive of professionals and institutions at any stage in their development, who are excited by our vision, committed to our values and eager to work across generations and who want to take a fresh look at philanthropy and reimagine our sector’s influence in society. EPIP’s community includes:

- **Professionals early in their careers** looking to develop their professional skills, to contribute their talents and insights through their work, and to lead change in their organizations and the sector;

- **Mid-career professionals newer to philanthropy** seeking to deepen their understanding of the field and how to bring an equity lens to their work and the sector;
- **Mid-career professionals with philanthropic experience** looking to take their leadership to the next level and committed to our vision and values;
- **Senior professionals and institutions** excited by our vision for the sector, who want to bring their wisdom, experience and standing as champions to influence changes across the sector.

While EPIP will continue to focus on developing young professionals and those newer to the sector (not limited by age), we will actively engage seasoned professionals to advance equity and social justice in the sector.

II. Updates to Vision, Mission and Guiding Principles (Values)

We are updating our Vision, Mission and Guiding Principles in order to better reflect our expanded vision for our community, our field and our world. These revisions have been shaped by many in our community and reflect our desire to focus both on professional excellence and active leadership for equity.

Vision

Through our revisions, we looked to capture an inspiring future that we want to work toward and that would reflect EPIP’s direction, purpose and unique role in the field.

- **Current Vision**
EPIP envisions a day when all generations of practitioners in philanthropy collaborate effectively to build better foundations for a better world.
- **Updated Vision**
EPIP envisions a world where people of all identities can live full and prosperous lives, supported by a diverse, equitable, inclusive and effective philanthropic sector.

More specifically, we envision a field that:

- Fosters healthy, safe and inclusive work environments, where staff from diverse backgrounds and life experiences can bring their whole selves to work;¹
- Responds to and is inclusive of nonprofits and local communities - especially those most vulnerable, such as people of color, LGBTQ people, women, immigrants and refugees, etc. - in grantmaking, activities and decision-making;²

¹ Drawn from D5 Coalition, “State of the Work: Inspiration & Ideas for Advancing Diversity, Equity, & Inclusion in Philanthropy,” 2013-2016.

² Drawn from Grantmakers for Effective Organizations, “Do Nothing About Me Without Me: An Action Guide for Engaging Stakeholders”, 2010.

- Communicates in plain language,³ models transparency, makes itself deeply accessible to the public and communities, and devotes energy to making the grantee experience efficient and empowering;⁴
- Takes bold stances on issues and is willing to incur risks to uphold our most deeply held values and ideals;⁵ and
- Continuously pushes itself to test creative approaches and adopt effective practices to advance all of the above.

Mission

Our goal in these revisions has been to reflect the broader role we envision for EPIP in the sector and the world.

- **Current Mission**

EPIP’s mission is to develop emerging leaders committed to building a just, equitable, and sustainable society.

- **Updated Mission**

EPIP’s mission is to empower emerging leaders and elevate philanthropic practice in order to build a more just, equitable, and sustainable society.

Prior version in last draft of strategic plan (the version above was revised based on community feedback): EPIP’s mission is to cultivate, activate and empower rising leaders to advance excellence in philanthropy and build a more just, equitable and sustainable society. Open-share participants considered it an “upgrade” but still thought it was too clunky.

Guiding Principles (Values)

As with the revisions above, we wanted to make our guiding values more explicit and update them to reflect changes in the field. We want these values to pervade everything we do, both as an organization and as a broader community.

- **Current Guiding Principles (Values)**

- *Generational Change & Multigenerationalism:* We believe that foundations should integrate the experience of senior leaders with the innovation of emerging leaders.
- *Professionalism & Effectiveness:* We believe that practitioners in philanthropy should be educated and trained to act according to the highest ethical and professional standards.

³ Drawn from The Communications Network, published by The Edna McConnell Clark Foundation and authored by Tony Proscio, “In Other Words,” “Bad Words for Good,” and “When Words Fail” (learnphilanthropy.org/jargon-finder)

⁴ Drawn from Center for Effective Philanthropy, “Working Well with Grantees: A Guide for Program Staff,” 2014.

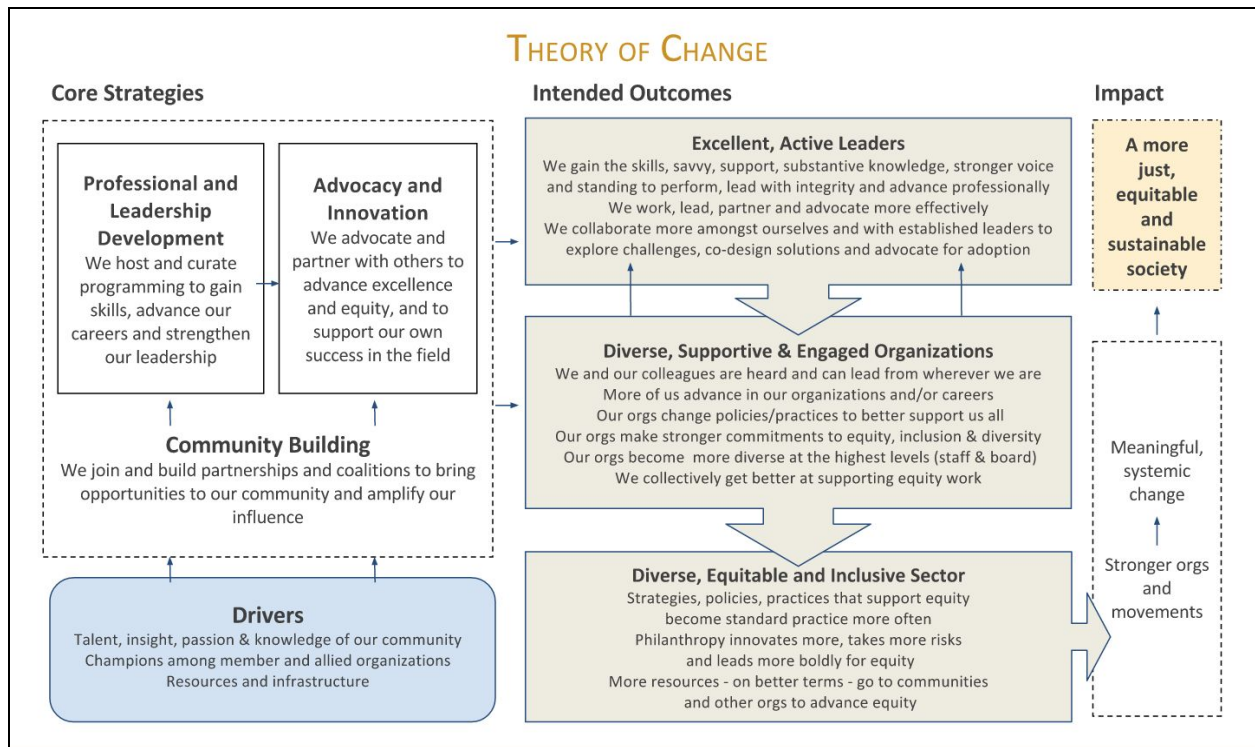
⁵ Drawn from National Committee on Responsive Philanthropy’s “Philanthropy: It’s Time to Choose Sides,” 2017.

- *Social Impact to Build a Better World:* We believe that philanthropy should endeavor to create a more just, equitable, and sustainable society.
- **Updated Values -- Our Five Commitments**
 - **Commitment to Shared Leadership:** We lead boldly and lift up the leadership that lives throughout the EPIP community - individually and collectively, locally and nationally, and intergenerationally. We believe there's power in collaboration. We invite ourselves and each other to step into greater leadership, and we bring our unique strengths to our work with partners to influence the sector.
 - **Commitment to Excellence:** We hold ourselves to high standards of professional practice and integrity, working compassionately and creatively to respond to the complex needs of the people and communities we support. Recognizing that excellence commands respect, we develop talent with an eye for supporting our members to grow our collective influence.
 - **Commitment to Community:** Acknowledging that philanthropy alone doesn't hold all the answers, we believe in the power and leadership of communities most affected by inequities. We actively seek to uplift the voice and wisdom of communities we support, and for a growing number among us, the communities we come from.
 - **Commitment to Diversity, Equity and Inclusion:** We work to advance a sector that reflects the rich diversity of our nation at all levels of leadership, and that protects and ensures fair access to resources, opportunities, and political processes to all people, regardless of gender, race, ethnicity, nationality, sexual orientation, class, ability and age.
 - **Commitment to Learning:** We believe we are all always a work in progress. We're committed to our development as leaders by taking measured but courageous risks, thoughtfully testing ideas, being honest about failures, and embracing learning as part of a continuous growth process.

IV. Theory of Change

Below is a snapshot of our theory of change. In the text that follows, we dig into each piece.

Our Theory of Change in a Snapshot



Intended Outcomes

Based on EPIP's updated Vision (Section II above), we will focus our efforts on achieving the following Intended Outcomes:

- 1. Our members are better able to perform with excellence, lead for equity, and advance in their careers.** This involves helping equip our members with the skills, savvy, substantive knowledge, support, standing and stronger voice to become even more bold leaders advancing excellence, equity and social justice. They will work, lead, partner and advocate more effectively. Our members collaborate more amongst themselves and with established leaders to explore challenges, co-design solutions and advocate for adoption of policies and practices that will better advance equity both within and outside their institutions.
- 2. Philanthropic institutions better support and engage diverse, emerging leaders, and are thus better able to get the most out of their talent.** EPIP and its members help foster healthy and safe work environments where a diverse staff from all different backgrounds and walks of life can engage, lead and advance as their whole selves. Institutions soften the strictures of hierarchy, and break from an inward-looking focus to engage more people meaningfully in their work. The grantee experience becomes

better-supported -- perhaps even delightful -- and more accessible. Organizations become more diverse at all levels, including boards and executive leadership.

3. **A more diverse, equitable and inclusive sector innovates with intention, takes risks, and leads more boldly, bringing resources to communities and organizations to advance equity.** It takes a stand on a greater range of issues that affect human dignity and wellbeing. Our sector brings greater resources to the most vulnerable communities and actively seeks the knowledge of vulnerable populations, including people of color, LGBTQ people, women, immigrants and refugees, etc., in determining the solutions that will secure a better future. The outcomes in the previous list item become field standards.



CORE STRATEGIES



Core Strategies to Advance Our Outcomes

Aligned with EPIP’s updated Mission (Section II above), we have identified three **Core Strategies** to bring about change, as well as possible activities under each Core Strategy:

1. **Professional and leadership development resulting in excellent, active leaders, both in our institutions and at the sector-level.** Over the next three to five years, we will strengthen and align our professional and leadership development activities around the themes below, building from essential skills and expanding to leadership around both internal and external advocacy, particularly as it relates to growing adept at integrating an equity lens. These themes have already informally guided our programming, but making them more explicit will better help us meet the many, varied needs of our members:
 - *Hard skills development*, including both “standard” job-related professional skills as well as newer approaches to the work (e.g., design thinking)
 - *Learning philanthropy*, including the history of the field, different models of and roles for philanthropy, and the mechanics and craft of the work
 - *Social justice and equity*, including the history of social justice work, specific social justice issues, content related to specific populations and how to bring an equity lens to one’s work
 - *Leadership stance*, helping our members find their own, personal approach to leadership within and outside their institutions

- *Internal and external advocacy and influence*, including managing up, supporting and managing organizational change, and engaging in leadership and activism outside of work
- *Current events and philanthropy*, putting both positive news and reports of injustice in context and helping members explore how they and their institutions might respond
- *Career advancement*, helping members identify and chart potential career paths.

This is an ambitious framework, and we will rely on a combination of EPIP-branded programs, chapter-led programming, and partner content. We expect it may take several years to fully build this model out, and that it will evolve further over time.

2. **Advocacy and innovation to create a more diverse, equitable and inclusive sector.**

EPIP’s greatest asset is our passionate and driven community of changemakers. We will use a variety of tools and approaches to advance our updated vision for philanthropy, described above. Sometimes, these initiatives will be staff-driven. At other times, we will support self-organized or ad hoc efforts driven by EPIP Members or others in our community. Our toolkit of approaches will likely include:

- Supporting the leadership and activism of individuals and groups of members
- Engaging in or facilitating dialogue across generations (e.g. support chapters in engaging senior leaders)
- Lifting member and partner voices
- Co-designing solutions with members and partners
- Leading or supporting campaigns (e.g. research or promotion of partner research).

How we might prioritize advocacy issues

- The work aligns with EPIP’s updated mission, vision and values
- There is energy from board, staff and/or broader EPIP community; we bring a unique, value-added vantage point or can amplify the perspectives of others
- We can have a material impact or influence on the issue with the resources we have available
- Our impact is enhanced by using the training and community-building parts of our strategy
- The issue is pressing and timely, or ongoing and seemingly intractable
- EPIP is well-positioned to address the issue or contribute to solutions
- Addressing the issue brings benefits back to EPIP’s membership

Examples of initiatives could include:

- Promoting practices that support leadership of junior and midlevel foundation staff (e.g., staff satisfaction surveys, cross-functional working groups, staff “chatter” portals)

- Working with designers to develop ways to make grant application processes “surprising and delightful” (e.g., better technology, making instructions clearer and easier, mitigating “hurry-up-and-wait” issues)
 - Multigenerational dialogue around social justice philanthropy in specific regions
 - Concurrent chapter-led programs on a social justice topic (“EPIP Day of Equity”)
3. **Community-building to enrich the EPIP experience, bring opportunities to our members, and amplify our and others’ influence.** We believe that the most influential leaders are not only grounded in community, but connected and well-networked. As such, we will not only invest in skill building, but in facilitating cross-chapter sharing and collaboration, and building relationships with organizations that share our vision. Collectively as a community of leaders, we will amplify our influence and that of partners, allies, and communities through mutual support toward our shared goals. This might include:
- Strengthening the EPIP Community as its own network (e.g. Chapter Leader academy, deeper engagement with Institutional Members)
 - Facilitating greater cross-chapter collaboration
 - Developing content and program partnerships
 - Connecting EPIP members to external efforts and opportunities
 - Engaging in joint campaigns and coalitions
 - Building new collaborations where necessary.

V. Implementation in Stages: Yearly Strategic Priorities (At-A-Glance)

Recognizing that our vision is long-term (we imagine 10 to 20 years), we mapped out initial priorities to help guide how we’ll begin working toward this vision over the next 3 to 5 years.

- In initial stages, our focus will be on:
 - Rolling out strategy and identifying excitement and opportunity
 - Improving chapter and cross-cutting infrastructure
 - Strengthening organizational capacity (primarily program and chapter support)
 - Enhancing technical infrastructure for collaboration
 - Strengthening LD/PD efforts
 - Prototyping and building on small pilot project(s) that emerged from our process (e.g., Sector Experience Survey)
 - Begin experimenting with distributing work across our community
- In subsequent years, we will move gradually into:
 - Moving new pilots into more established efforts (such as initiatives or campaigns), especially around advocacy and innovation
 - Learning and assessing progress/momentum/impact
 - Prioritizing, adjusting and pivoting as needed
 - Planning for the future

Priorities are summarized in the table below, and described in slightly greater detail in the appended implementation addendum.

	I - Years 1-2	II - Years 2-3	III - Years 3-4	IV - Years 4-5+
Priorities	<p>I. Strengthen Infrastructure & Build Distributed Leadership</p>	<p>II. Build Community Capacity and Assess Pilot</p>	<p>III. Reflect, Adapt and Formalize</p>	<p>IV. Solidify and Plan for the Future</p>
Milestones	<ul style="list-style-type: none"> - Engage EPIP Community & create opportunities for member organizing, chapter alignment around new strategy - Refine and start using new program areas (staff and chapter/ member-driven programs) - Pilot advocacy and innovation strategy with findings from Sector Experience Survey, plus other opportunities as appropriate (such as a model for distributing work across our community) - Shore up key gaps in capacity; continue strengthening internal operations - Develop evaluation plan 	<ul style="list-style-type: none"> - Early staff- and community- driven projects under way - Start building a cluster of advocacy and innovation projects as member interest and capacity allow (TBD) - Continue to bolster capacity and strengthen operations - Continue to add chapters and other peer-led groups as appropriate 	<ul style="list-style-type: none"> - Confirmation on how to expand/grow (if appropriate) - Identify additional advocacy issues - Revenue streams to support growth 	<ul style="list-style-type: none"> - Organizationally excellent with optimal capacity and competencies built out - Members advancing and leading - Institutions are beginning to adopt desired changes

VI. Conclusion

The times we live in demand more of all of us. As communities and values we hold dear fall under attack and the relevance and legitimacy of our sector are questioned, we as a community must bring our whole selves -- our backgrounds, our talents, our passions, our hopes and dreams, our frustrations -- to push our sector into deeper and more effective servant leadership for equity and social justice.

At the conclusion of this Strategic Plan, we imagine an EPIP that features:

- A robust suite of programs, better-tailored to the needs of our members, to support their growth as professionals and as leaders
- Deep knowledge of the practices that best support the success, leadership and advancement of our members, and the ability to disseminate those practices if not support institutions in implementing them

- A vibrant network of leaders, partners and allies implementing programs, projects and campaigns to advance our vision and values in the field and bring opportunities back to our members.

Ultimately, we envision a multi-generational EPIP community that is even more connected and coordinated, powered by a common purpose and approach to the field. Through rigorous professional development offerings paired with opportunities to advocate for the changes they care about most, our members are emboldened and inspired by their experiences at EPIP, confident from knowing they are part of a broader movement to bring philanthropy into deeper alignment with their shared convictions.

We want to extend our deep gratitude to the many people in our EPIP community and beyond who contributed their passion, wisdom and insight and who helped collectively to co-design this strategic plan. We look forward to deepening our shared leadership and working together toward equity to build the kind of field we want to work in, and the kind of sector which we believe can deliver on the promise of transformative changes for a more just, equitable and sustainable society.