

# 2011

## Impact Assessment

**EPIP**

**Emerging Practitioners in Philanthropy**  
The next generation of grantmakers

Putnam Community Investment  
Consulting, Inc.

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April 6, 2011

### **About Emerging Practitioners in Philanthropy (EPIP)**

EPIP's mission is to develop extraordinary new leaders to enhance organized philanthropy and its impact on communities. EPIP envisions a day when all generations of practitioners in philanthropy collaborate effectively to build better foundations for a better world. EPIP focuses its efforts in three impact areas:

- **Generational Change & Multigenerationalism:** Foundations should integrate the experience of senior leaders with the innovation of emerging leaders.
- **Professionalism & Effectiveness in Philanthropy:** Practitioners in philanthropy should be educated and trained to act according to the highest ethical and professional standards.
- **Social Impact to Build a Better World:** Philanthropy should endeavor to create a more just, equitable, and sustainable society.

For more information, please visit [www.epip.org](http://www.epip.org).

### **About the Author**

Putnam Community Investment Consulting, Inc. is a national, award-winning consulting and evaluation firm that partners with philanthropic foundations and nonprofit organizations to research, develop, manage, and evaluate grantmaking strategies and philanthropic initiatives. For more information, please visit [www.putnamcic.com](http://www.putnamcic.com).

### **Acknowledgements**

EPIP is appreciative of its members, prospective members, alumni, partners, and other participants who responded to our survey and who agreed to be interviewed for this project. EPIP is also grateful to the Ford Foundation and the Robert Wood Johnson Foundation for their support. This impact assessment would not have been possible without the funding and efforts of these organizations and individuals.

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## Executive Summary

### I. Multigenerationalism and Leadership Development

**EPIP's focus on multigenerationalism has had a positive impact on philanthropy.** Ninety-seven percent (97%) of survey respondents reported that *as a result of EPIP*, there is increased interaction and dialogue between senior and new foundation staff, and 95% said they believe philanthropy has benefited from EPIP's efforts to prepare the next generation of leaders. They also reported that young or new foundation staff now have more opportunity to get involved in philanthropy (60%) and that these staff are more active in the field than they were before (50%).

**EPIP has expanded professional and leadership development opportunities for emerging practitioners.** Almost two-thirds (60%) of survey respondents believed that EPIP increased the opportunities for involvement in philanthropy for young or new foundation staff. Almost all (98%) believed that EPIP has been "somewhat to very effective" in increasing the presence and participation of new, emerging staff at philanthropy conferences and in increasing the number of sessions and workshops for and about younger/new foundation staff at conferences.

**Members value peer learning and networks gained through EPIP.** Two-thirds (64%) of members reported that *as a result of relationships they developed through EPIP*, they are participating in new professional development activities, and half (50%–54%) have met people they can turn to for help in performing their jobs well and regarding being underrepresented in the field.

**EPIP supports leadership development early in careers.** Many members interviewed described how EPIP provided unique venues to learn, practice, and advance their leadership early in their careers. This included opportunities to propose and lead sessions at conferences, plan events, serve on steering committees, and lead chapters. Senior leaders also noted that EPIP provides an important "alternative route to high engagement" for emerging leaders.

**EPIP helps members stay engaged in and advance their careers in philanthropy.** Members interviewed described how involvement in EPIP helped reduce their feelings of isolation and helped them make critical choices related to staying in the field and charting their career paths.

### II. Professionalism and Effectiveness in Philanthropy

**Employers benefit from EPIP's contributions to professional development.** Seventy-five percent (75%) of EPIP members surveyed reported making positive contributions to their organizations as a result of their involvement with EPIP. This includes becoming more confident in taking on more responsibilities (37%), becoming better able to advocate for issues they feel are important in their foundations (24%), and learning ways to do their jobs more effectively (23%).

**Participants use the knowledge, skills, and networks developed through EPIP to improve their job performance.** Seventy percent (70%) of all survey respondents who had been involved in EPIP longer than one year said that as a result of their involvement in EPIP they had

established new professional relationships that have been beneficial to their work. Half (56%) described positive changes at their jobs as a result of their involvement in EPIP, including now seeing themselves as leaders in their field (26%) and improving their job performance (22%).

**EPIP brings value to national and regional associations of grantmakers.** EPIP has collaborated with a wide range of funder networks, including 11 regional associations of grantmakers (in the locations of all its chapters), national affinity groups, and the Council on Foundations. According to those interviewed, EPIP provides value because these associations can leverage EPIP's network of next generation leaders, expertise, and infrastructure.

**EPIP fills an important need in educating and orienting those new to philanthropy.** Many senior leaders and EPIP members interviewed described the need to “demystify” philanthropy and grantmaking work, and to orient those new to philanthropy. This was recognized as an important need that EPIP helps to fill, with several executive directors stating appreciation that their staff has a venue for learning about the field beyond their own institutions.

**Participants value that EPIP is run by and for emerging leaders.** Almost all (92%) of survey respondents reported that EPIP is different from other foundation associations they have been involved in, and this is primarily because it is run by and for young people (75%).

### **III. Social Impact to Build a Better World**

**EPIP helps grantmakers connect their daily work to broader social change.** Among all survey respondents, 30% reported that they believe that since becoming involved with EPIP they can connect the ideal of social justice philanthropy to their daily job responsibilities.

**EPIP members and participants connect their career success to social change.** Eighty-nine percent (89%) of respondents reported that social justice is “somewhat to very important” to their careers.

**Participants find peer connections and support that help them make change.** Sixty-four percent (64%) of members surveyed indicated that as a result of people they met through EPIP, they have established professional relationships with people with similar commitments to social justice philanthropy.

**EPIP brings increased attention to social justice philanthropy.** About one-third (36%) said they feel that there is increased dialogue and awareness in the field about social justice philanthropy as a result of EPIP, as well as increased attention on racial, gender, and class diversity at foundations.

## **I. Introduction**

In anticipation of its 10<sup>th</sup> anniversary, Emerging Practitioners in Philanthropy (EPIP) decided to look ahead, and also to look back. In 2010 it engaged in a strategic planning process and developed its first strategic plan, including updated vision and mission statements: EPIP envisions a day when all generations of practitioners in philanthropy collaborate effectively to build better foundations for a better world. EPIP's mission is to develop extraordinary new leaders to enhance organized philanthropy and its impact on communities.

As part of this process, EPIP clearly defined three guiding principles for its work ahead:

- **Generational Change & Multigenerationalism:** Foundations should integrate the experience of senior leaders with the innovation of emerging leaders.
- **Professionalism & Effectiveness:** Practitioners in philanthropy should be educated and trained to act according to the highest ethical and professional standards.
- **Social Impact to Build a Better World:** Philanthropy should endeavor to create a more just, equitable, and sustainable society.

EPIP also wanted to look back at the last 10 years to better understand its impact on emerging leaders and on the field of philanthropy, and to inform the implementation of its strategic plan. To accomplish this, EPIP commissioned Putnam Community Investment Consulting, Inc., a national philanthropy consulting and evaluation firm, to conduct an impact assessment. This document summarizes key findings from that assessment.

## **II. Organizational Growth and Accomplishments**

EPIP's accomplishments include its impressive growth over the past decade. EPIP was established in 2001. In that year the first EPIP chapter was launched in New England, followed quickly by the New York chapter in 2002. Today EPIP has 11 chapters across the country, 500 dues-paying members, and 98 members serving in leadership roles in its local chapters and on its national Board of Advisors.

EPIP received its first seed grant of \$125,000 from the Ford Foundation in 2002, the same year that Rusty Stahl was hired as the first executive director (EPIP's first paid staff person). Since then, EPIP has grown into an organization with annual budget of \$875,000 and two full-time employees, including an executive director and a membership director, as well as two part-time consultants focusing on fund development and chapter support.

EPIP has received a total of \$2,428,600 in grants from 13 foundations over the past 10 years, including the Charles Stewart Mott, W.K. Kellogg, Marguerite Casey, Levi Strauss, Ford, Silicon Valley Community, Annie E. Casey, Kresge, and Robert Wood Johnson Foundations, as well as from the New York Community Trust, Carnegie Corporation of New York, Unitarian Universalist

Veatch Program at Shelter Rock, and Lumina Foundation for Education. Additionally, in 2010 EPIP generated \$120,000 in membership dues from individual members as well as from 40 foundations and philanthropy organizations that have institutional memberships for their staff to participate in EPIP.

In 2004 EPIP became a recognized affinity group of the Council on Foundations (COF) and has since partnered with COF on many significant accomplishments, including:

- Helping design and launch COF's Next Generation Task Force, in partnership with Resource Generation and 21/64
- Organizing the Generational Leadership Track at COF's 2008 Summit
- Organizing Emerging Leader Salons and other "next-generation" programming at COF's 2007 and 2008 Annual Conferences and at its 2008 and 2009 Family Philanthropy Conferences
- Organizing the Next Generation Pre-Conference, prior to COF's 2009 Annual Conference

EPIP has also developed working relationships and partnerships with 11 regional associations of grantmakers (RAGs) where its 11 chapters are located. These collaborative efforts vary but include providing next-generation educational programming to funders and establishing EPIP as the next-generation affinity group for the RAGs. Additionally, EPIP helped Independent Sector conceptualize its NGen program.

EPIP has also developed a robust offering of unique programs and member benefits over the past 10 years, including:

- **Sixteen national convenings and workshops** organized between 2005 and 2011. This includes an annual National Conference, which sold out in 2011 (doubling registration from the previous year with more than 200 registered participants). The 2010 National Conference additionally drew over 8,000 online participants via live video streaming of the conference.
- **Philanthropology™ curriculum**, which was launched as a workshop in 2003, developed into a curriculum in 2005, and was redesigned and relaunched beginning in 2009. It includes four modules focused on understanding philanthropy, social impact, and generations in philanthropy, as well as managing power dynamics. Philanthropology™-related workshops have been held in seven cities since 2003.
- **Professional Development Fund** to provide access to professional development for young people of color working in the foundation field. This includes partial funding to attend philanthropy conferences; an annual awardee convening to provide skills training, reflection on practice, intergenerational learning; and peer networking, plus a growing peer-support network of PDF awardees and other young people of color in the foundation field.
- **Next Generation Scholarship Fund** to help EPIP members attend national EPIP conferences.
- **Member Benefits**, including discounts on a growing collection of grantmaker resources, such as member rates on EPIP national and chapter events, courses from the Grantmaking

School, subscriptions to the Foundation Review and the Chronicle of Philanthropy, membership with National Committee for Responsive Philanthropy, and more.

EPIP has also engaged in efforts to develop and strengthen its organizational capacity over the past 10 years. Most recently, it defined three guiding principles that translate into impact areas for its work: generational change and multigenerationalism, professionalism and effectiveness in philanthropy, and social impact for a better world. These guiding concepts were developed during EPIP's strategic planning process in 2010.

EPIP completed its first strategic plan in September 2010. It included a revised mission and vision statement and the development of four external goals (focused on membership development, chapter development, curriculum and programming, and communications) and four internal goals (aimed at building organizational capacity in the areas of leadership, technology, communications, and fund development). EPIP has developed a detailed action plan and updated the roles and responsibilities of its Board of Advisors to ensure successful plan implementation.

It is worth noting that EPIP's strategic impact areas strongly resonate with current members, alumni, allies, and prospective members who were surveyed. When asked how important each of these ideas are in relation to their careers in philanthropy, 95% of respondents reported that philanthropic effectiveness is "somewhat to very important," followed by social justice philanthropy (social impact) (89% of respondents) and generational change (multigenerationalism) (85% of respondents).

EPIP has also made efforts to strengthen the capacity of its local chapters by organizing four national Chapter Leader Gatherings over the past six years. These are opportunities for the leadership of all EPIP chapters to meet, share ideas and strategies, discuss challenges, and receive training on topics such as fund-raising, social media, recruitment, and governance. It has also recently engaged a part-time consultant to provide ongoing technical, governance, and leadership development support to all chapters and to support a national advisory committee of chapter chairs.

### III. Support and Leadership Development for Emerging Practitioners

At the heart of EPIP are its efforts to prepare and engage the next generation of leaders in philanthropy. As the survey and interview findings highlight, EPIP has demonstrated a great deal of success in this area. Some of the ways it has prepared and engaged emerging leaders in philanthropy include helping professionals who are young or new to the field meet and connect with peers, develop and use new professional networks, and expand their professional and leadership development. These are described in greater detail below.

#### Meeting and Networking with Peers Is an Important Benefit for EPIP Members

A consistent benefit to EPIP members and participants has been the opportunity to meet others who are also new to philanthropy and use these networks for advice and support.

***EPIP brings unique value as an affinity group.*** Ninety-two percent of survey respondents reported that EPIP is different from other foundation associations they have been involved in. This is primarily because it is run for and by young people (75%) and because members “get to meet people like myself” (48%). Additionally, 29% of respondents appreciated that in EPIP they “get to learn from the experiences of younger staff and emerging leaders,” indicating that more experienced leaders benefit from EPIP’s focus on emerging leaders as well.

There are all sorts of unspoken rules in philanthropy, and EPIP remains the only place for new or young people to get comfortable in their professional skin, and to reconcile that with their personal values. There are no other affinity groups that claim to do that, or that do it in the same way. EPIP is still that place where you don't have to impress, you don't have to come with an agenda, and it's not a precalculated conversation. I think it's invaluable to the field.

Melissa Johnson, Executive Director  
Neighborhood Funders Group

I really can't overstate the importance of building this national network of young people who are connected and who want to stay in the field. Without EPIP, I don't think that would exist. You would be on your own if you were looking to stay in philanthropy or looking to grow your career. There are other affinity groups, but none that are focused on progressing careers in social justice philanthropy.

Elizabeth Ramirez, Foundation  
Coordinator  
Levi Strauss Foundation

EPIP members interviewed for this impact assessment echoed these findings. In some of their experiences, affinity groups have seemed geared toward executive directors and senior leaders, offered few opportunities for younger staff to get involved, and felt less welcoming. They also described EPIP as “staying more up to date,” “relevant,” and “addressing issues that are important to me” as compared to other national and regional associations of foundations in which they have participated.

At the same time, several members appreciated that EPIP encourages its members to get involved in other affinity groups as a way to expand their knowledge about and participation in the field.

**Members seek support from their EPIP network and engage in professional development.** Three-quarters (76%) of members surveyed indicated ways that they sought support from and engaged with peers, colleagues, and their network as a result of being involved with EPIP, and also ways that they became more active in their own professional development. For example:

- One-half of these respondents (48%) stated that the peer network they built through EPIP was somewhere they turned to “regularly for ideas and support.”
- One-third (36%) of survey respondents said EPIP also encouraged them to go beyond their EPIP networks and “reach out to colleagues for help or advice.”
- One-third (36%) of members had become more active in professional organizations related to their work.
- Over one-quarter (28%) had taken on new leadership roles.
- Just as valuable as professional networks, over one-third of respondents (37%) said that they “have made great friends through EPIP.”

**Participants established new, helpful professional relationships as a result of EPIP.** Seventy percent (70%) of all respondents who had been involved in EPIP longer than one year (and 65% of all members, including those new to EPIP) said that as a result of their involvement in EPIP, they had established new professional relationships that have been beneficial to their work. Among members, activities that resulted from these new relationships developed through EPIP included:

- Participating in new activities that addressed their professional growth and development (64%)
- Establishing professional relationships with people with similar commitments to social justice philanthropy (64%)
- Meeting people that they can turn to for support regarding being new to or underrepresented in the field of philanthropy (54%)
- Meeting people they have turned to for information and resources to help them perform their jobs well (50%)
- Learning about the local philanthropic community (47%)
- Advocating for additional opportunities for younger foundation staff or emerging leaders (31%)

**EPIP helped Sylvia Spivey advocate for professional development and learn from best practices to inform her work.**

Sylvia Spivey, Development and Scholarship Associate at the Philadelphia Foundation, described how receiving EPIP’s Professional Development Fund (PDF) scholarship not only helped cover half of the costs for her to attend a conference but also helped her advocate for her professional development.

“I was a recipient of EPIP’s Professional Development Fund scholarship, which allowed me to attend a national conference that directly related to my new position as a scholarship administrator. The PDF scholarship was invaluable to my career. I had been dropped into my position to take on a new leadership role, but I didn’t feel I had any power. Coming back from EPIP’s PDF gathering, I felt like I had power. Armed with the PDF scholarship and advice I received from EPIP colleagues, I was able to put together a presentation to my boss and the foundation president as to why they needed to invest in me in order for me to do my job better and serve our community.

“My foundation agreed to send me to the national scholarship conference. The information and connections I made at that conference provided me with ideas and best practices that I was able to implement at work. My foundation sent me back to that same conference the next year and covered all the costs because I was able to show them how important it was.”

Two-thirds (66%) of members surveyed rated the networking skills they've received through their participation in EPIP as "high" and "very high," and 61% rated the importance of the networks they've built through their involvement with EPIP as "high" and "very high."

***Young Leaders of Color Value Networks Built Through EPIP.*** While EPIP's literature, mission statement, and strategic plan emphasize its programs and services as targeted toward those who are young and/or new to philanthropy, many of these programs and services also address the needs of underrepresented minorities/people of color in philanthropy. More women than men appeared to value these networks because they were composed of other women of color, according to interviews conducted by EPIP in 2007. More specifically, women of color appeared to mention this benefit the most out of all subgroups. These women discussed the isolation they had felt in the field of philanthropy before becoming involved with EPIP and how helpful it has been to call on these networks or even just know that there are others like themselves in the field.

Young women of color also expressed most often that they felt isolated in the field of philanthropy. They were followed by white women and then white men. These young women appeared to value the friendships, networks, and overall support they received through EPIP, because EPIP helped them realize that there is a broader network of people in philanthropy who are, according to one member, "young, qualified, female, and minority." She was further reassured when she realized that EPIP's efforts to include young, new, and minority grantmakers were intentional.

I got a chance to go to the Professional Development Fund conference, which I think was life-changing—that's the only way I can put it. Absolutely inspiring to be with young people, young people of color, young women of color working in philanthropy. That in itself is powerful, to have that space where you're with people who look like you and may have come from the same background as you and are trying to figure out a way to make their own difference in the philanthropic world.

Christi Tran, Program Officer  
Blue Shield of California Foundation

## EPIP Provides Important Professional and Leadership Development Opportunities

EPIP's programs and networks have also fostered professional growth and leadership development for its members and participants.

***EPIP increased professional development opportunities for young and new philanthropy professionals.*** Ninety-eight percent (98%) of survey respondents believed that EPIP has been “somewhat to very effective” in impacting the field by increasing the presence and participation of new, emerging foundation staff at philanthropy conferences, and also that EPIP has been effective in increasing the number of sessions and workshops for and about younger/new foundation staff at philanthropy conferences and workshops. Almost two-thirds of survey respondents (60%) believed that EPIP increased the opportunities for involvement in the field of philanthropy for young or new foundation staff. A majority of survey respondents (50%) also believed that young or new foundation staff are more active in the field than they were before, as a result of EPIP.

There are challenges in being new to philanthropy, whether because of age or experience. You need help getting questions answered, dispelling concerns, and talking about valid conflicts. Sometimes a more seasoned mentor might not be the right person to help you. There is value in being able to find and identify with people who are at the same trajectory of professional and career growth.

Carly Hare, Executive Director  
Native Americans in Philanthropy

***EPIP provides unique leadership development opportunities early in careers.*** Members interviewed emphasized how critically important it has been for their careers to have had opportunities to learn, test, and improve their leadership skills through EPIP. Because EPIP is run by and for emerging leaders, because its mission is to develop new leaders, and because its organizational structure includes a national office plus 11 chapters, EPIP not only provides education, tools, and encouragement to support leadership development but it also provides a greater number of leadership-building venues for young and new philanthropy professionals than most national and regional philanthropy affinity groups. Members interviewed described

Being part of the EPIP network helped me hone my leadership skills and take risks in my career. I was able to build relationships outside of my region and state and was able to apply those leadership skills not just in my own foundation but on a national scale, which allowed my national network to flourish.

Melissa Johnson, Executive Director  
Neighborhood Funders Group

opportunities to propose, design, and lead conference workshops; plan events; lead chapters; join boards of directors; and demonstrate leadership far earlier in their careers than they otherwise would have.

As a result, many members felt that they had “come into their own” as grantmakers much sooner. Through their EPIP networks and participation in EPIP's educational programs, they learned leadership lessons before making those mistakes on their own. By “practicing” leadership in EPIP, they were able to hone skills that they could later apply to nonprofit boards and

leadership positions in other philanthropy organizations. As a result of EPIP, members interviewed felt they had become better grantmakers, leaders, and advocates for change and that they had begun to be seen as leaders by their colleagues. These findings are corroborated EPIP's 2007 membership survey, in which 95% of respondents reported that EPIP played a "somewhat to very relevant" role in their professional development.

The leadership opportunities are invaluable, and have increased my confidence in the work place.

Survey respondent

***Involvement in EPIP helped boost confidence.*** Overall, a majority of people surveyed for this project (80%) believed that their involvement with EPIP has had positive effects on their levels of confidence as related to their profession.

- One quarter (25%) of survey respondents felt more confident that they would become senior leaders in the field of philanthropy as a result of their involvement with EPIP, and also that they felt more confident.
- One quarter (22%) had also become more confident working with senior staff at their organization.
- One-third (31%) have become more confident in taking on more responsibilities at their organizations.

***By reducing isolation, EPIP helps emerging leaders stay in the field.*** The development of supportive networks of peers described earlier in this report helps members make critical choices related to staying in the field and charting out their career paths in philanthropy. One member said she was not sure if she could have a career in philanthropy, and after becoming involved in EPIP she realized not only that she could but that she was excited to stay in the field. Another member wasn't sure if working in foundations was in alignment with her social justice values. After talking with members of the EPIP chapter in her city, she realized that she could make a difference through philanthropy and now works as a program officer. The ability to make and use supportive networks through EPIP is critical, especially for younger professionals who have not yet had the time or breadth of experience to develop extensive networks on their own.

Several members also described how EPIP has helped younger professionals stay connected to philanthropy despite losing their jobs due to the recession. For them it was advantageous to stay involved in their local EPIP chapters while they sought employment. Another member felt her leadership involvement in EPIP was one way to demonstrate to her current employer that she was committed to philanthropy and to her job. While the majority of those who are new to the field spoke of feeling isolated and uncertain about specific career paths, white women and women and men of color who are new to the field of philanthropy often feel these sentiments more than white men. According to interviews conducted in 2007, for white women and women and men of color, professional development that includes increasing their presence and participation at local and national philanthropy conferences addresses feelings of isolation and also diversifies the field as a whole.

**EPIP helped Elizabeth Ramirez stay involved in philanthropy, advance her career, and relocate across the country.**

According to Elizabeth Ramirez, Foundation Coordinator at the Levi Strauss Foundation:

“I literally wouldn't be here at the Levi Strauss Foundation if it weren't for EPIP. I met our Executive Director, Daniel Lee, at the EPIP conference last spring. I had known of the Levi Strauss Foundation, and when I saw the opportunity to speak with him, I jumped on it and followed up a little while later with a conversation. A few months later I got a call asking if I would be interested in interviewing for a position with the foundation. That right there is how EPIP has been a huge influence in my life. Without EPIP's scholarship to help me get to the conference last year, I wouldn't have been able to attend and I wouldn't have met Daniel. I didn't have an employer who was sponsoring me, and my finances were limited. Just the fact that EPIP was investing in me as a person, rather than as a representative from an organization, meant a lot to me—and continues to. That's what I think really sets EPIP apart from a lot of other professional organizations and associations. It's more personal.”

Additionally, Elizabeth was able to stay involved in philanthropy while in between jobs by being active in the Washington, D.C. EPIP chapter. When she decided to relocate to San Francisco to work for the Levi Strauss Foundation, she contacted colleagues at the Seattle EPIP chapter who introduced her to EPIP members in San Francisco. “Having this network of like-minded people who I knew would be welcoming was a huge relief when I decided to move. The national EPIP network is really strong.”

***EPIP helped young and emerging professionals navigate their career paths.***

Members interviewed described how EPIP helped them navigate their jobs and determine their career goals. For example, one member was promoted within her foundation and asked to revamp her new position. She turned to the EPIP members she met at the Professional Development Fund gathering, who helped her figure out how to rewrite her job description and advocate for more professional development to be successful in her new role. Another member was considering taking her first executive director position, and she reached out to colleagues she met through EPIP who were familiar with the organization to help her decide if it would be a good fit for her (she decided it was and accepted the position—she now leads a national foundation affinity group).

Several members interviewed described the ways in which EPIP helped them learn how to create change in their organizations, even though they weren't necessarily in positions of power. They also explained that simply learning about the different types of foundations and philanthropic organizations across the country was helpful. They said that sometimes they were the only young person in their foundation, weren't exposed to other foundations in their daily jobs, weren't supported by their employer to attend national or local grantmaker convenings, or worked in more areas where there weren't many grantmakers nearby. For some, EPIP was their only venue for professional development, networking, and exposure to the broader field.

EPIP was another avenue for me to connect with other young professionals. I was in a phase where I was trying to decide whether to stay in philanthropy or leave the field. So to meet other young people who were possibly in the same mindset or who were devoting their careers to the field, it really helped to talk to them. It helped me learn more about the field, what they liked about philanthropy, and their career paths

Jasmine Hall Ratliff, Program Officer  
Robert Wood Johnson Foundation

## Employers Benefit from EPIP's Professional Development

From my perspective as the executive director, our staff who have been engaged with EPIP have brought a capacity for bold vision and for confident and competent leadership.

Ned Wight, Executive Director,  
Unitarian Universalist Veatch Program  
at Shelter Rock

Many people surveyed and interviewed described how, as a result of what they learned through EPIP, they were able to make improvements at their jobs. For example, 75% of EPIP members surveyed reported making positive contributions to their organizations as a result of their involvement with EPIP. This includes becoming more confident in taking on more responsibilities (37%), becoming better able to advocate for issues they feel are important in their foundations (24%), and learning ways to

do their jobs more effectively (23%).

Of survey respondents who have been involved with EPIP for at least one year, 56% described positive changes at their job as a result of their involvement in EPIP, including now seeing themselves as leaders in their field (26%) and improving their job performance (22%). Some examples of organizational impacts from members interviewed and survey respondents include:

- A program officer met with the chief of staff to explain the importance of professional development and networking for young and new foundation staff. As a result, this foundation decided to send five additional staff to the 2011 EPIP national conference.
- An EPIP member who took a position as an executive director of a national foundation affinity group made changes to the organizational culture to increase shared leadership among staff.
- A program officer identified new grantees that her foundation is now funding, as a result of relationships built through EPIP.
- An executive director hired a program associate through an EPIP job posting and after meeting him at an EPIP conference.
- A program officer at a state-wide foundation successfully advocated that the foundation provide additional technical assistance to grantseekers who represent more marginalized communities.
- A program officer at a large private foundation has become more vocal in expressing her perspectives and opinions in meetings.
- An experienced grantmaker and CEO of an international foundation was challenged through EPIP to reflect on his own leadership development, and as a result he changed how he supervises and builds the leadership of all his staff.

If philanthropy is going to be relevant, we have to include talented young people.

Rob Collier, CEO  
Council of Michigan Foundations

Other members interviewed explained that what they learned through EPIP helped them become better and more thoughtful grantmakers and helped them better understand the expectations and needs of more seasoned grantmakers. Several senior leaders interviewed

described how participation in EPIP helped their staff overcome the barriers and feelings of isolation they experienced when they joined the field of philanthropy. Participation also helped these staff members build relationships, and it opened doors for new opportunities. One senior leader emphasized that the ability to network among peers is especially helpful when an employee is the only young staff person at a foundation.

Because of my past involvement in EPIP, now that I am in an executive director role I am more sensitive to the needs of my staff and am consciously planning for their involvement in philanthropic associations.

Survey respondent

#### IV. Generational Change & Multigenerationalism

A primary focus of EPIP is to support generational change and multigenerationalism by integrating the experiences of senior leaders with the innovation of emerging leaders. This involves not only helping to connect emerging and senior leaders in philanthropy but also ensuring healthy leadership expansion and transition.

The importance of advancing generational change resonated strongly with EPIP members and alumni, senior allies and partners in the field, and even prospective members. Eighty-five percent (85%) of survey respondents rated the importance of generational change as “somewhat to very important” to their careers in philanthropy. This is also evident in how experiences with EPIP were described by survey respondents, members and partners interviewed for this project, members surveyed by EPIP in 2007, and members and sector leaders interviewed during the 2010 strategic planning process. For example, after interviewing 67 EPIP members and leaders, funders, and partners/senior leaders in philanthropy, EPIP’s strategic planning consultant Open Source Leadership Strategies concluded:

*Far and away, EPIP is most recognized and highly regarded for its “generational change” work. Interviewees reported that they can see the tangible results of EPIP’s efforts in the changing conversation of the sector. To be sure, EPIP cannot take full credit for this progress, as a number of groups have advanced this work, but EPIP is at the table and recognized as an important player in moving and sometimes even leading the discourse.*

EPIP has been particularly impactful in helping to create awareness about the importance of supporting the next generation of leaders in philanthropy.

Dori Kreiger, managing director of Family Philanthropy Services, Council on Foundations

## Connecting and Supporting Multiple Generations of Leaders Is Critical for Philanthropy

The importance of deepening the connections between new and experienced philanthropy professionals, expanding leadership opportunities, and ensuring healthy leadership transitions was described by virtually everyone interviewed for this project. As Ralph Smith, executive vice president of the Annie E. Casey Foundation and former chair of the Council on Foundations Board of Directors, succinctly described it, “To the extent that you care about the future of philanthropy, you’ve got to care about the next generation of philanthropic leaders.”

EPIP has done a lot to strengthen a pipeline of leaders moving into and up through philanthropy by giving people mentoring opportunities, confidence boosters, and the chance to develop skills like serving on boards, public speaking, or social-justice thinking.

Caroline Altman Smith, Program Officer  
The Kresge Foundation

Many interviewed described the generational shift in leadership that is coming across all sectors as baby boomers retire. They cautioned that, unlike other sectors, philanthropy has not been adequately preparing for this change. They explained the critical need to ensure that philanthropy has an ongoing, intentional pipeline of qualified, talented, diverse, and engaged leaders to fill leadership positions that will be created by this shift—not just for CEOs but for all levels of leadership, such as vice presidents and senior program officers. This includes a pipeline of individuals moving into the field and of people advancing into leadership positions.

Many senior leaders described the benefits of engaging with emerging leaders and deepening emerging leaders’ involvement in philanthropy. This included the need for philanthropy to “stay relevant,” the benefits of involving younger people with “fresh eyes and fresh perspective” who bring new ideas and solutions, and the need to involve new leaders in sustaining a foundation’s vision and values over time. One cited the important role that EPIP plays in “translation,” making sure that those who have been working in philanthropy for decades are using language that is relevant today.

Increasing the pipeline of people who are familiar with philanthropy—familiar with how it works, its challenges, and its opportunities—is an important service to the field. I think it is a great opportunity for philanthropic institutions to pay attention to EPIP, and to make sure that we’re connected with them and helping them place the people that they’re training.

Luz Vega Marquis, CEO  
The Marguerite Casey Foundation

Some emphasized the importance of effective philanthropic leadership in order to best advance the work of nonprofits, which are the primary vehicles of change in this field. Mike Gast of Resource Generation explained that it is important that foundation staff are trained in how

best to support social change through philanthropy, such as by providing general operating support, mission-related investing of foundation assets, and even through streamlined grantmaking processes. Similarly, several highlighted the need to ensure that the next

Succession planning, transition, and next-generation leadership should be matters of strategy, not just serendipity. What EPIP has helped to do is to provide for a more thoughtful engagement around these issues in philanthropy.

Ralph Smith  
Executive Vice President  
Annie E. Casey Foundation

generation of philanthropy leaders represents the diversity of communities served and approaches grantmaking through a lens of equity and social justice.

EPIP's efforts to support generational change have had a positive impact on both the field of philanthropy and on individuals, as described in greater detail below.

### **Philanthropy Has Benefited from EPIP's Efforts to Advance Multigenerationalism**

Ninety-five percent (95%) of survey respondents believe that the field of philanthropy has benefited from EPIP's efforts to prepare the next generation of leaders. This includes a significant proportion who believe that there are now increased opportunities for forming professional networks that address the concerns of emerging leaders (51%), that there is more organized and sustained attention paid to the specific needs of new leaders (44%), and that senior leaders in philanthropy have been encouraged to consider next-generation issues. Additionally, many believe there is increased awareness of the need for a diverse workforce in philanthropy (44%) and that more people are aware that those coming to philanthropy from other fields benefit from support (36%).

Further, almost two-thirds (60%) of survey respondents reported EPIP has positively impacted the field of philanthropy because young or new foundation staff now have more opportunity to get involved in philanthropy, and half (50%) believe that these staff are more active in the field than they were before.

Survey respondents who felt they could assess EPIP's impact on the broader philanthropy field overwhelmingly described EPIP as being effective in this regard.<sup>1</sup> Between 95% and 98% reported that EPIP was "somewhat to very effective" at impacting the field of philanthropy through:

- Increased presence and participation of new, emerging foundation staff at philanthropy conferences (98%)
- Increased numbers of sessions and workshops for and about younger/new foundation staff at philanthropy conferences and workshops (98%)
- Increased dialogue between new and senior foundation staff (97%)

As a program associate, it's not like people are falling all over you to have you be on their boards of directors, or chair meetings, or be in any kind of a leadership capacity because you're thought of as young and you haven't yet put in your time or earned your stripes. Being involved in EPIP provided a very concrete way for me to test out my leadership style.

Molly Hafid Shultz, Program Officer,  
Unitarian Universalist Veatch Program  
at Shelter Rock

- Increased interaction between more experienced foundation leaders and new foundation staff (97%)
- Increased opportunities for more experienced foundation leaders to hear about the challenges facing the next generation of foundation leaders (95%)

Interviews with EPIP members and senior philanthropy leaders confirmed these findings, as did data collected through EPIP’s strategic planning process.

Although most cautioned that it is difficult to fully assess EPIP’s impact on the field, since there are other organizations addressing next-generation issues in philanthropy, EPIP was seen as the “coordinating arm” and go-to organization for next-generation philanthropy. “EPIP has been doing this the longest and has the largest membership, the longest reach, and the most developed agenda,” according to one senior leader.

EPIP put the idea on the map that there is a new generation of leaders in philanthropy, and that we have an obligation to work with them.

Bradford Smith, President  
Foundation Center

Senior leaders interviewed also explained how, from their perspective, EPIP supports the field. For example, they believe the field benefits because EPIP:

- Creates a national “platform” for members of the next generation to formulate their opinions and speak with one voice
- Encourages critical thinking to challenge existing organizations to improve and stay relevant
- Provides grantmaker associations with access to new perspectives (because those associations often only have access to the young professionals who have taken on roles within their committee systems)
- Provides seasoned leaders with ideas and strategies to engage next-generation leaders
- Expands the pipeline of people who are familiar with philanthropy, trained, and connected
- Identifies talented emerging leaders

Many leaders of national organizations who were interviewed also described changes they were making as a result of their involvement with EPIP. For example, Resource Generation turned to EPIP for advice about developing a membership program and chapter structure. Native Americans in Philanthropy will share materials about EPIP on its national tour of meetings with members, encouraging those who are young or new to philanthropy to join EPIP. It is also coordinating with EPIP on its new fellows program.

## Emerging and Experienced Leaders Have Benefited from EPIP's Efforts to Advance Generational Change

Almost all survey respondents (92%) reported that they have personally experienced EPIP's efforts to facilitate generational change. When asked how they had *most strongly* experienced these efforts, the majority (54%) reported that attending forums and events that bring together established and emerging leaders in the field of philanthropy was the clearest way in which they had experienced EPIP's focus on generational change. This was followed by:

- Being introduced to current leaders in the field of philanthropy (37%)
- Being provided with next-generation workshops and events so that more established foundation staff could learn from younger staff and emerging leaders (34%)
- Seeing EPIP advocate that more attention be paid to generational change by senior leaders in philanthropy (29%)
- Experiencing EPIP's financial support for younger leaders attending philanthropy conferences and workshops (28%)
- Observing EPIP's efforts to make professional opportunities in philanthropy accessible to underrepresented groups (21%)

I've benefited immensely from EPIP. It really is a space for and by emerging leaders in the field, so you have the opportunity to take leadership, facilitate committees, and propose and lead sessions at national conferences as someone who is just a few years into this field. I've also been able to build authentic relationships with people from other grantmaking institutions, with other EPIP members, and with leaders who are older or who have been around for a lot longer because EPIP can connect me to those leaders, as well as with my peers, so that's been really useful.

Braeden Lentz, Program Associate,  
Unitarian Universalist Veatch Program at  
Shelter Rock

Further, 40% of respondents reported that as a result of their involvement in EPIP, they better understand the need to involve the next generation of leaders in philanthropy.

I've learned a ton. One of the things we do a lot at the local EPIP chapter is bring in experienced leaders from other foundations and have them share their expertise. It's hard to even quantify what I've learned, because I've learned so much by having that opportunity to candidly speak with those leaders.

Nick Scheibel,  
Donor Services Associate  
The Minneapolis Foundation

EPIP members interviewed described how their involvement in EPIP has helped them stay in the field, develop their leadership abilities, and advance professionally. The reasons these emerging leaders joined EPIP included a desire to learn more about the field beyond their own organization (including the tools and skills needed to navigate the field), wanting to learn more about social justice philanthropy, wanting to meet and network with colleagues like themselves (e.g., those new to philanthropy, younger, people of color), and wanting to practice leadership. Two current members joined specifically to get advice from peers on whether to enter into and stay in the

field. More about how EPIP supported the professional and leadership development of younger staff and emerging leaders is described in greater detail below.

Additionally, while many foundations orient new employees to their foundations, few orient new staff to the field of philanthropy as a whole. Many senior leaders and EPIP members interviewed described the need to “demystify” philanthropy and grantmaking work. This was recognized by several people as an important need that EPIP fills. Some executive directors appreciated that their staff had an alternative venue for learning about the field. One of the reasons the Robert Wood Johnson Foundation recently made a three-year, \$100,000 core support grant to EPIP was for exactly this reason, to help ensure that not only RWJF staff but anyone starting their first foundation job could have access to resources and information about the broader philanthropy field.

### **EPIP Supports Multigenerationalism Through Its Programming**

When asked how EPIP helps prepare and advance the next generation of leaders, EPIP members and leaders interviewed described a wide range of programs, offerings, and member benefits that are designed to accomplish this. They include:

- *Educational programs, workshops, and events designed to bring emerging and senior leaders together and learn from each other.* The most commonly mentioned of these is EPIP’s Emerging Leader Salons, at which seasoned leaders share their experiences and advice with a small group of EPIP members.
- *Philanthropology™ curriculum.* While all four of Philanthropology™’s four modules address some aspect of engaging and retaining talented leaders, its “Generations in Philanthropy” module specifically addresses multigenerationalism. The most recent Philanthropology™ session held in 2011 at the Charles Stewart Mott Foundation received high marks in the participant evaluation.
- *National conferences and convenings.* EPIP incorporates content related to multigenerationalism in most if not all of its sessions, workshops, and trainings.
- *Scholarships for emerging leaders of color.* EPIP offers Professional Leadership Fund scholarships to EPIP members each year to attend the EPIP national conference, and it also organizes an annual convening of scholarship recipients. EPIP members interviewed who had participated in convenings described it as “life-changing.” Seventy-six scholarships have been awarded between 2005-2011.
- *Providing and identifying leadership opportunities.* Members described EPIP as being a venue where they can take on new leadership opportunities that help them advance and deepen their engagement in philanthropy. Several senior leaders interviewed cited the importance of this because it provides an “alternative route to high engagement” in the field, because other leadership opportunities are limited (e.g., joining committees of national grantmaker associations). EPIP also disseminates information about philanthropy-related fellowships and job opportunities with members.

- *Formal and informal mentoring opportunities.* The EPIP New York chapter was successful in implementing a formal mentoring program for several years. Additionally, EPIP encourages informal mentoring among EPIP members.
- *Social media.* EPIP's LinkedIn and Facebook groups were identified as venues where EPIP members exchange information, such as job opportunities in philanthropy.

Additionally, the development of a strong peer network of philanthropy professionals through membership in EPIP (described previously in Section IV) was identified by many people interviewed as critical to supporting multigenerationalism, primarily because without it many younger philanthropy professionals would feel more isolated, less engaged, and less aware of opportunities to advance in the field.

## V. Social Impact to Build a Better World

Finding others who prioritize social justice philanthropy is another major reason that EPIP members value their participation in EPIP. Eighty-nine percent (89%) of survey respondents believe that social justice philanthropy is “somewhat to very important” to their career in philanthropy.

Additionally, EPIP members and participants reported that their involvement with EPIP has helped them better understand and be engaged in social justice philanthropy. Two-thirds (64%) of members surveyed indicated that as a result of people they met through EPIP, they have established professional relationships with people with similar commitments to social justice philanthropy.

Among all survey respondents, 30% believe that since becoming involved with EPIP, they can connect the ideal of social justice philanthropy to their daily job responsibilities. About one-third (36%) also feel that there is increased dialogue and awareness in the field about social justice philanthropy as a result of EPIP, as well as increased attention to racial, gender, and class diversity at foundations (30%).

EPIP also provided frameworks and tools through which its members have been able to view philanthropy via a more progressive lens. This excited many members interviewed in 2007 and again in 2011 because although they shared these values before their involvement in EPIP, EPIP helped them formulate and more specifically define these values and recognize how their current work relates to social justice, and it provided them with tools to increase equity and advance social justice philanthropy in their workplaces. For example, some learned how to talk about racial equity within their foundation, and to use data to tell a story about how their

The EPIP conference is probably one of the most diverse cross-sections of people that I've ever seen in a philanthropic meeting, and social justice philanthropy is integrated into all the sessions. This requires courage and commitment. To see that social justice is front and center at EPIP gives me hope in the next generation of philanthropists.

Daniel Lee, Executive Director  
Levi Strauss Foundation

foundations' grants are allocated across populations. “EPIP is still the only place where new or young staff can come into the field and both understand and identify what social justice philanthropy means in practice,” according to one member interviewed. Learning from senior leaders about how they had implemented social change philanthropy, including the obstacles they had encountered and how they overcame them, was helpful to several members interviewed.

Similarly, senior philanthropy leaders who have been partnering with EPIP find value in EPIP's focus on social impact and social justice. While they reported

It's important to be explicit about the values that drive our work. And that's one of the things that I appreciate about EPIP's work: It's values driven. From my vantage point, it's important that social justice is part of their agenda.

Luz Vega Marquis, CEO  
Marguerite Casey Foundation

that it is difficult to fully assess how EPIP has advanced social justice philanthropy in the field—since there are other organizations working on this issue—several interviewees felt that EPIP has been successful in raising the importance of social justice, “putting it higher on the screen.” As a result, according to Ralph Smith, executive vice president of the Annie E. Casey Foundation, “The field is paying attention to this and EPIP can take some credit for raising these issues.” Other funders appreciated that EPIP’s efforts are “values-driven” and explained that this is an important reason why they are supporting and partnering with EPIP.

We are working on a major social justice symposium as part of our Diversity and Inclusion Initiative. In preparation members of the Michigan EPIP chapter and three of my staffers at the Council of Michigan Foundations who are EPIP members helping to plan this symposium.

That’s an example of how we are collaborating with EPIP. EPIP has a social justice focus, and they have been terrific in helping us advance our social justice strategies.

Rob Collier, CEO  
Council of Michigan Foundations

## VI. Professionalism and Effectiveness in Philanthropy

EPIP’s third impact area is to support professionalism and effectiveness in philanthropy, based on the principle that practitioners should be educated and trained to act according to the highest ethical and professional standards.

Findings from the survey and interviews confirm that philanthropic effectiveness is important, and that EPIP has helped make advances in this area. Almost all (95%) of survey respondents

I think EPIP gives us the tools to be able to do effective grantmaking, to do our jobs better. And I think in the grand scheme of things, it helps the community.

Sylvia Spivey  
Development and Scholarship  
Associate  
The Philadelphia Foundation

reported that philanthropic effectiveness was “somewhat to very important” to their career in philanthropy (“philanthropic effectiveness” was defined in the survey this way: “Ensuring that that the next generation of foundation staff possess the knowledge, ethics, and skills to ensure that foundations perform with excellence and provide valuable services and impact for the public good.”)

EPIP’s efforts to prepare, engage, and connect emerging leaders; develop new opportunities for professional and leadership development; support multigenerationalism; and advance social justice philanthropy—all of which have been

described previously in this report—contribute toward effectiveness in philanthropy. By strengthening the capacity of and connections between professionals working in the field, philanthropy is strengthened. As EPIP member Rohit Burman, director of the Culture and Public Broadcasting Program at the Metlife Foundation, explained, “You can’t be effective if you don’t have relationships, if you can’t work collaboratively. That relationship-building is what EPIP is providing.” Additional examples of ways that EPIP contributes toward professionalism and effectiveness in philanthropy include:

- Seventy percent (70%) of respondents who had been involved in EPIP longer than one year said that as a result of their involvement, they have established new professional relationships that have been beneficial to their work.
- Sixty-four percent (64%) of members surveyed reported that as a result of EPIP, they are participating in new activities that address their professional growth and development, and one-third (36%) have become more active in professional associations related to their work.
- Of survey respondents who have been involved with EPIP for at least one year, 56% described positive changes at their job as a result of their involvement in EPIP, including now seeing themselves as a leader in

I think EPIP advances effective philanthropy by getting strong leaders to stay in the field, to want to work in the field, and to be motivated to do good work. I also think it's important to bring forward new ideas, and I think EPIP does that. There are new ways to think about evaluations; there are new ways to think about grantmaking.

Nick Schiebel  
Donor Services Associate  
The Minneapolis Foundation

their field (26%) and improving job performance (22%).

- Seventy-five percent (75%) of EPIP participants surveyed reported that their involvement in EPIP has positively impacted their contributions to their organizations.
- Eighty percent (80%) of people surveyed believed their involvement with EPIP has had a positive effect on their level of confidence as it relates to their profession.

Members interviewed also described how EPIP has equipped them with tools to become better grantmakers and motivated them to do good work, and they pointed to EPIP's role in supporting the Council on Foundations' Next Generation Task Force as a contribution to philanthropic effectiveness. Many senior leaders and EPIP members described the need to "demystify" philanthropy and grantmaking work for those new to the field. This was recognized as an important need that EPIP fills, with several executive directors stating appreciation that their staff have an alternative venue for learning about the field.

Additionally, several senior leaders interviewed who have partnered with EPIP described the organization as an effective and natural partner, a good collaborator. "For affinity groups that want to engage younger and newer foundation staff, it makes sense to partner with EPIP rather than reinvent all the work yourself," according to Carly Hare, executive director of Native Americans in Philanthropy.

We moved to a simpler grant process after I attended an EPIP conference, and that has improved our relationship with grantseekers.

Survey respondent

## VII. Conclusions

When asked what would be different if EPIP hadn't been in existence for the past 10 years, members who had been involved in EPIP said that they and their colleagues would be more isolated, have fewer professional relationships, be less aware of and connected to the broader field of philanthropy, and would have made fewer professional contributions to their organizations and the field. Additionally, they felt that fewer young people would enter or stay in philanthropy because they would not feel supported, and several included themselves in this group. The pipeline of leaders would be diminished. Further, they believed that EPIP has been successful in "pushing the envelope" nationally about the importance of engaging and preparing the next generation of leaders, while at the same time changing the perception that conversations about the next generation are adversarial.

As we invest in EPIP we're making an investment in the next 30 or 40 years of philanthropy.

Mike Gast, Co-Director  
Resource Generation

EPIP has made important contributions to the field of philanthropy. As described in this report and according to those surveyed and interviewed, EPIP's impact includes the following:

***Multigenerationalism and Leadership Development.*** EPIP's focus on multigenerationalism has had a positive impact on philanthropy. It has expanded professional and leadership development opportunities for emerging practitioners, supports leadership development early in careers, and helps members stay engaged in and advance their careers in philanthropy. Members value the peer learning and networks they've gained through EPIP.

***Professionalism and Effectiveness in Philanthropy.*** EPIP brings value to national and regional associations of grantmakers. Employers benefit from EPIP's contributions to professional development, and EPIP helps fill an important need in educating and orienting those new to philanthropy. Participants value that EPIP is run by and for emerging leaders, and they use the knowledge, skills, and networks developed through EPIP to improve their job performance.

***Social Impact to Build a Better World.*** EPIP has brought increased attention to social justice philanthropy. EPIP members and participants believe that social justice philanthropy is important to their careers, and EPIP helps them to connect their daily work to broader social change, and to find peer connections and support that help them make change.

## VIII. Methodology

Research for this impact assessment was conducted in February and March 2011.

**Interviews.** Sixteen telephone interviews were conducted in February and March 2011 to inform this project. This included 10 EPIP members and 8 senior philanthropy leaders. Members had been involved in EPIP from between 3 to 10 years, and all held a current or past leadership role, such as co-chairing an EPIP chapter or serving on EPIP's National Advisory Board. Senior leaders included representatives of organizations that had partnered with EPIP, national and regional associations of grantmakers, and funders. They had been involved with EPIP in a variety of ways, such as speaking at events; jointly planning events and conferences; hosting EPIP trainings; involving EPIP as an affinity group of a regional association of grantmakers; or providing grants, scholarships, and conference sponsorships. All interviews were conducted by Kris Putnam-Walkerly and were approximately 60 minutes long. All interviews were recorded either on audio or video, and all were transcribed.

**Document review.** Existing EPIP data and documents were reviewed as part of the data collection and analysis for this project. Our document review consisted of different types of data collected by EPIP since 2002. We reviewed more than 20 video testimonials/interviews from EPIP members filmed in 2007. Additionally, we reviewed member evaluation summaries from five different EPIP gatherings and workshops. We also reviewed two documents containing testimonials from senior leaders in philanthropy and from EPIP supporters. Lastly, we reviewed a data summary from EPIP's strategic planning process, as well as the strategic plan itself, to ensure that the framework and organization of our impact assessment project addressed the areas outlined.

**Online survey.** The online survey was sent to 2,334 people in EPIP's database with valid e-mail addresses, which includes current members; alumni (former members who want to continue to stay engaged); prospective members; and others including funders, partner organizations, and "friends" of EPIP. Potential respondents were told they could be entered into a raffle to win an iPad; free registration to EPIP's 2011 conference; or a book entitled *How to Become a Nonprofit Rockstar*, by Trista Harris and Rosetta Thurman.

The survey was administered during a two-week period in March 2011, and 335 people completed it (a 15% response rate). Respondents identified themselves as current members (59%), alumni (14%), prospective members (12%), senior-level allies or observers of EPIP (10%), those employed at an organization that partners with EPIP (10%), or funders (5%). Additionally, 14% of survey respondents currently hold or previously held a leadership role in EPIP (e.g., co-chair of a local EPIP chapter). Survey respondents were predominately female (75%), relatively new to philanthropy (62% had worked in philanthropy less than five years), well educated (61% had a master's degree or doctorate), currently working in philanthropy (82%), and employed at a foundation (68%).

Regarding the job level of their current positions, professionals who work at the “program officer/manager” level comprised the largest percentage of respondents (38%), followed by associate (24%), director (14%), senior management (10%), assistant (5%), board member (1%), and other (9%). Over one-half (52%) described the primary focus of their work as program, followed by administration (15%), fund-raising (7%), communications (6%), finance (3%), evaluation (3%), and other (13%). Just over one-half of respondents were white (56%), followed by black (15%), Asian (13%), Hispanic/Latino (8%), mixed race/other race (6%), and American Indian/Alaskan Native (2%). The size of foundations where respondents work was evenly spread out across asset levels:

- Below \$5M (15%)
- \$5M–\$20M (15%)
- \$20M–\$100M (15%)
- \$100M–\$500M (19%)
- \$500M–\$1B (15%)
- Over \$1B (19%)

Over one-half of survey respondents (53%) have been involved with EPIP between one and three years, and just less than one-third (28%) have been involved less than one year. Just over one-half of survey respondents (52%) currently participate in activities organized by their local EPIP chapter. Of those, the San Francisco Bay Area chapter was most represented (22%), followed by New York (21%), Seattle (10%), and Boston (10%). Between 3% and 7% of current chapter participants surveyed are from EPIP’s remaining seven chapters.

Forty-three percent (43%) of respondents had attended at least one national EPIP event. This includes national EPIP conferences (including pre-conference events and next-generation leadership tracks at the Council on Foundations annual conference) as well as smaller gatherings and trainings targeted toward specific groups of members, such as chapter leaders and recipients of EPIP scholarships. Those most widely attended included the EPIP 2010 National Conference in Denver (22%) and the 2008 Generational Leadership Track at the Council on Foundations Summit in Washington, D.C. (12%).

Eighty-five percent (85%) of respondents participated in at least one of the other activities or member benefits that EPIP offers. Over three-quarters (77%) had participated in a meeting or event of a local EPIP chapter. About one-third had participated in an EPIP-sponsored workshop or training and EPIP’s social media groups on LinkedIn and Facebook and had read or used books about philanthropy that had been distributed to EPIP members. Additionally, 28% had attended an Emerging Leader Salon, and 20% had received advice or referrals from EPIP staff.

## Appendix A: Interviewees

1. Rohit Burman, Director of the Culture and Public Broadcasting Program, MetLife Foundation
2. Robert Collier, President & Chief Executive Officer, Council of Michigan Foundations
3. Mike Gast, Co-Director, Resource Generation
4. Molly Schultz Hafid, Program Officer, Unitarian Universalist Veatch Program at Shelter Rock
5. Carly Hare, Executive Director, Native Americans in Philanthropy
6. Melissa Johnson, Executive Director, Neighborhood Funders Group
7. Dori Kreiger, Managing Director, Family Philanthropy Services, Council on Foundations
8. Daniel Lee, Executive Director, Levi Strauss Foundation
9. Braeden Lentz, Program Associate, Unitarian Universalist Veatch Program at Shelter Rock
10. Luz Vega Marquis, President & Chief Executive Officer, Marguerite Casey Foundation
11. Elizabeth Ramirez, Foundation Coordinator, Levi Strauss Foundation
12. Jasmine Hall Ratliff, Program Officer, Robert Wood Johnson Foundation
13. Nick Scheibel, Donor Services Associate, The Minneapolis Foundation
14. Bradford Smith, President, Foundation Center
15. Caroline Altman Smith, Program Officer, The Kresge Foundation
16. Ralph Smith, Executive Vice President, Annie E. Casey Foundation
17. Sylvia Spivey, Development & Scholarship Associate, The Philadelphia Foundation
18. Christi Tran, Program Officer, Blue Shield of California Foundation
19. Ned Wight, Executive Director, Unitarian Universalist Veatch Program at Shelter Rock

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<sup>i</sup> About one-third of survey respondents responded “don’t know” when asked to rate EPIP’s effectiveness in impacting the field of philanthropy in five areas relating to encouraging relationships and interactions between new and experienced philanthropy professionals. In our experience conducting interviews with EPIP members and senior philanthropy leaders about EPIP, some people chose to share their thoughts about EPIP’s impact and effectiveness based upon their own experience and observations of EPIP and the field, and others took questions about effectiveness and impact literally and felt they could not respond because they didn’t have quantitative data to prove their answers (e.g., data that counted the number of new foundation staff attending conferences to show that more were attending national foundation conferences over time).

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