

# EPISCOPAL Impact Fund

ADVANCING PATHWAYS OUT OF POVERTY

## Strategic Plan 2019-2021

### Message from **Bishop Marc Andrus**

Dear Friends,

This year Episcopal Impact Fund celebrates its 40th year as the outreach arm of the Diocese of California, working in every corner of the Diocese to bring our shared vision of a Bay Area without poverty closer to reality. Through targeted grants, mentoring and guidance, Episcopal Impact Fund increases the capacity of nonprofits to make a real difference in our communities.

This strategic plan, which will guide Episcopal Impact Fund's work over the next three years, represents many hours of creative thinking, animated discussions, and the hard work of listening to and learning from each other.

I am very grateful to the board and staff of Episcopal Impact Fund for their excellent work, to the many stakeholders who provided valuable input and to donors – past, current and future – who are partners in our mission and make it all possible.

I look forward to another 40 years of outreach, caring and compassion from Episcopal Impact Fund.

*+ Marc Handley Andrus*



# Key Findings

Episcopal Impact Fund began its strategic planning process by assessing its strengths, challenges, threats and opportunities. Through surveys of board and staff, targeted interviews with donors, grantees and staff of other foundations, we assessed our capabilities and our interest in moving into new areas of focus such as housing.

**The results of this assessment can be seen in this graphic:**

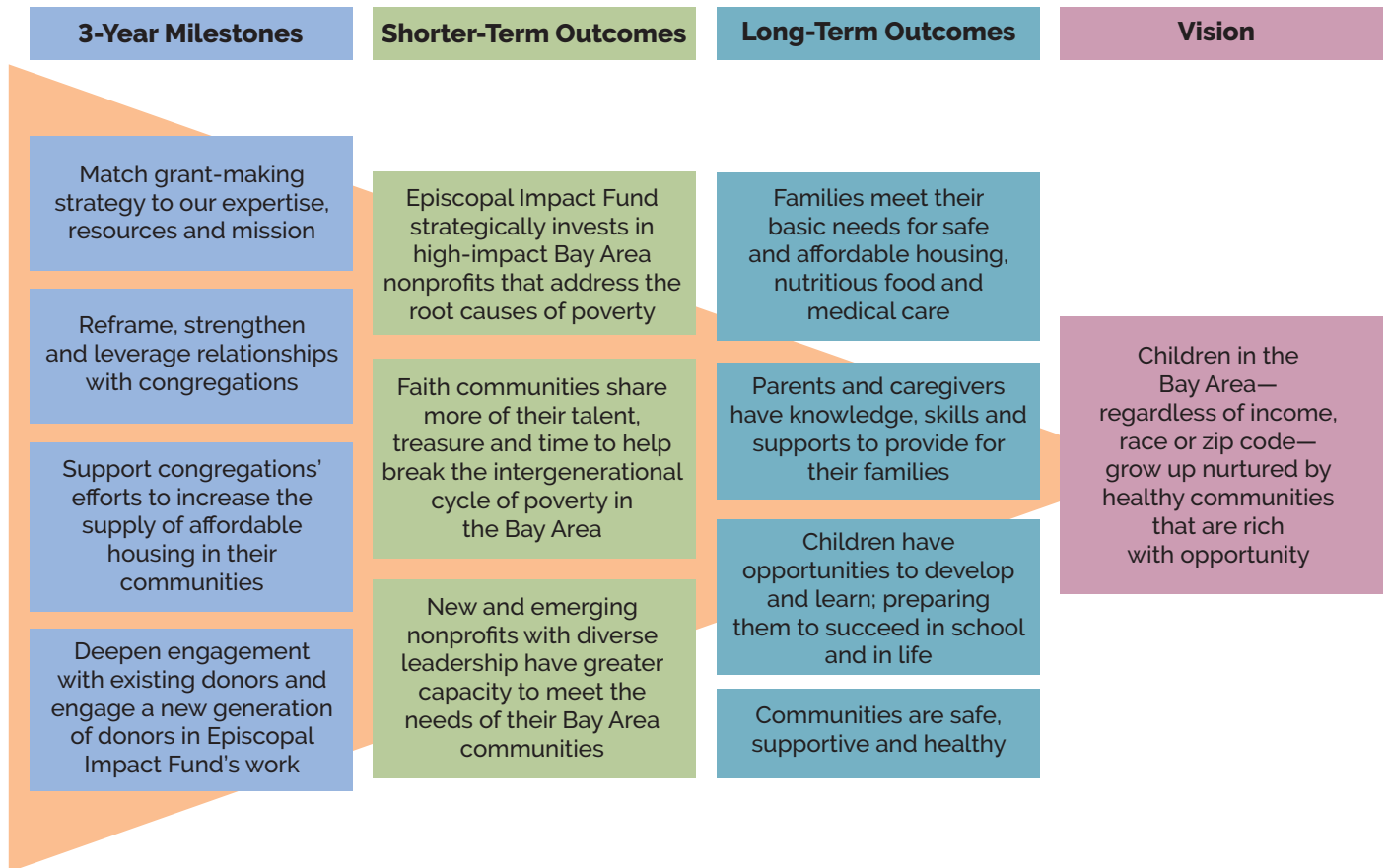


# Theory of Change

We also created our first theory of change to help us understand how best to fulfill our mission of addressing the root causes of poverty in the Bay Area. In creating a theory of change, we

- Rediscovered how crucial our relationships with Episcopal congregations continue to be
- Determined that our impact would be increased through larger, targeted grants
- Determined that our granting should focus on disrupting intergenerational poverty by granting primarily to organizations that serve children, youth and those who take care of them.

## Here is a representation of our theory of change:

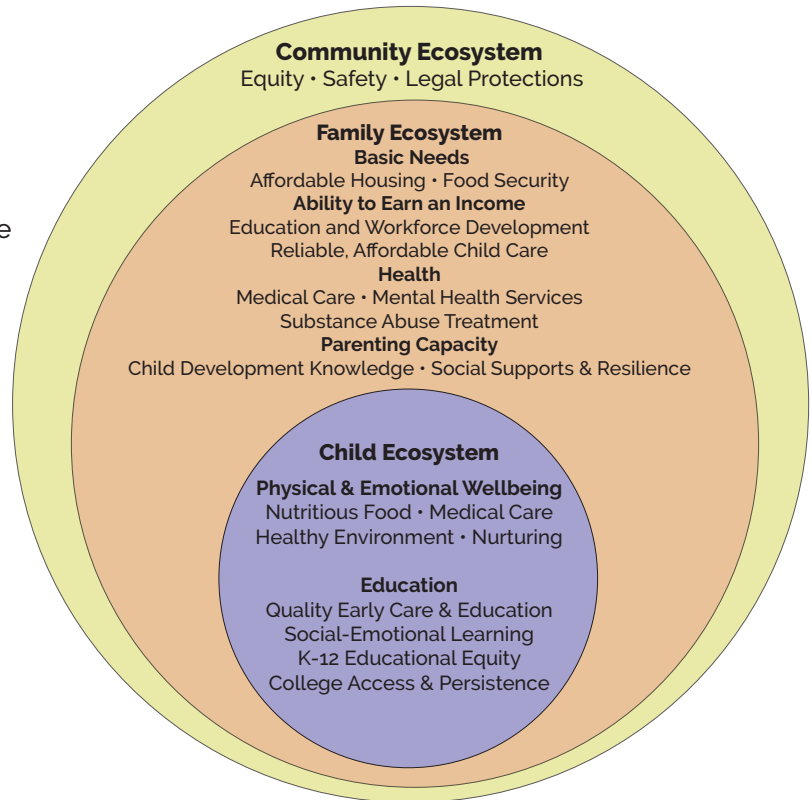


# Strategic Direction

Finally, we turned to the plan itself and identified four strategic directions for the next three years.

- Over the next three years, Episcopal Impact Fund will focus more closely on its relationship with Episcopal congregations in the Diocese of California. **We envision a dynamic relationship with a mutually beneficial engagement, in which we provide support to congregational outreach efforts through grants, advice and expertise; and congregations support us through participation in our fundraising events, serving as board members and other meaningful ways appropriate to each congregation.**
- We will create two granting programs: One will be restricted to congregations to support their outreach efforts to people living in poverty. The second program, our community-based grants, will provide fewer, larger grants, all aimed at disrupting intergenerational poverty by serving youth, children and their families. **Our grantmaking will be informed by our theory of change and by the Ecosystem for Change.**
- We will add a housing component to our granting to help increase the supply of new affordable housing. A key strategy within the housing component is directly dependent on our deepened relationship with congregations, as we support congregations in discerning whether their non-strategic real estate could be used to create additional housing for their low-income neighbors.
- Finally, we will strengthen our long-term viability by creating a planned giving program and by engaging a new generation of donors and supporters.

## Ecosystem for Change



### In summary, our four new strategic directions are

1. Reframe, strengthen and leverage relationships with congregations;
2. Match grantmaking strategy to our expertise, resources and mission;
3. Support congregations' efforts to increase the supply of affordable housing in their communities; and
4. Deepen engagement with existing donors and engage a new generation of donors in Episcopal Impact Fund's work.