

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.

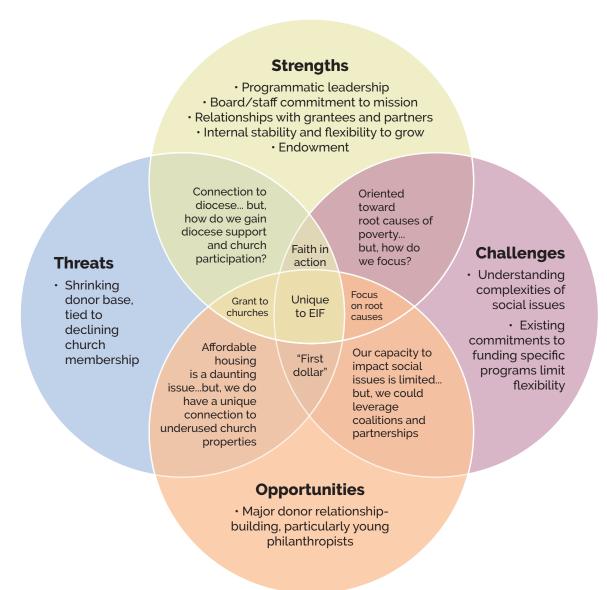
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Key Findings

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:

3-Year Milestones Long-Term Outcomes Vision **Shorter-Term Outcomes** Match grant-making **Episcopal Impact Fund** Families meet their strategy to our expertise, strategically invests in basic needs for safe resources and mission high-impact Bay Area and affordable housing, nonprofits that address the nutritious food and root causes of poverty medical care Reframe, strengthen and leverage relationships Children in the with congregations Bay Area— Faith communities share Parents and caregivers more of their talent. have knowledge, skills and regardless of income, treasure and time to help supports to provide for race or zip code— Support congregations' grow up nurtured by break the intergenerational their families efforts to increase the healthy communities cycle of poverty in supply of affordable that are rich the Bay Area Children have housing in their with opportunity opportunities to develop communities and learn; preparing New and emerging them to succeed in school nonprofits with diverse Deepen engagement and in life leadership have greater with existing donors and capacity to meet the engage a new generation Communities are safe. needs of their Bay Area of donors in Episcopal supportive and healthy communities Impact Fund's work

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.

Ecosystem for Change

Community Ecosystem

Equity · Safety · Legal Protections

Family Ecosystem Basic Needs

Affordable Housing • Food Security

Ability to Earn an Income

Education and Workforce Development

Reliable, Affordable Child Care

Health

Medical Care • Mental Health Services Substance Abuse Treatment Parenting Capacity

Child Development Knowledge · Social Supports & Resilience

Child Ecosystem

Physical & Emotional Wellbeing Nutritious Food • Medical Care Healthy Environment • Nurturing

Education

Quality Early Care & Education Social-Emotional Learning K-12 Educational Equity College Access & Persistence

- 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.

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;
- 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.