



STRATEGIC PLAN 2020-2025

MISSION

To amplify and increase the impact of lean funders by building an inclusive community where they can learn, connect, and collaborate

VISION

Transformed communities through informed giving

GOAL 1

AMPLIFY AND INCREASE THE IMPACT OF LEAN FUNDERS

Exponent Philanthropy offers a wide range of services specifically for lean funders to advance their impact and champion their powerful style of philanthropy.

GOAL 3

MAXIMIZE OUR RELEVANCE AND ACCESSIBILITY TO A VARIETY OF FUNDERS

Exponent Philanthropy offers valuable, easily accessible resources to a wide variety of funders throughout their philanthropic journey.

GOAL 2

BUILD A BROADER AND DEEPER EXPONENT PHILANTHROPY COMMUNITY THROUGH SHARING AND COLLABORATION

Exponent Philanthropy invests in and creates opportunities for sharing and collaboration among lean funders; it also facilitates connections between lean funders and other influencers in the philanthropic sector.

GOAL 4

ADVANCE DIVERSITY, EQUITY, AND INCLUSION IN PHILANTHROPY

Exponent Philanthropy cultivates a culture that advances diversity, equity, and inclusion within our organization and among our community of lean funders.

GOAL 1 **AMPLIFY AND INCREASE THE IMPACT OF LEAN FUNDERS**

Exponent Philanthropy offers a wide range of services specifically for lean funders to advance their impact and champion their powerful style of philanthropy.

Outcomes

- Our community of lean funders is more knowledgeable about the best practices and strategies that create philanthropic impact.
- Our community applies its expanded knowledge to maximize its contributions to society.
- Philanthropic stakeholders are more aware of our community's impact and more likely to support Exponent Philanthropy's work.

Strategies

- Equip lean funders with tools and resources to measure, define, and advance their philanthropic impact.
- Elevate lean funders' stories to foster learning, inspire others, and build awareness of their powerful style of philanthropy.
- Collect and disseminate data that advances our community's philanthropy and supports Exponent Philanthropy's efforts to champion their impact.
- Invest in professional development that equips Exponent Philanthropy's staff to serve our community's diverse funder types and advance their philanthropy.
- Offer more opportunities for lean funders to connect, learn, and collaborate.
- Define and build awareness of the style of philanthropy that lean funders practice that result in outsized impact.

GOAL 2 **BUILD A BROADER AND DEEPER EXPONENT PHILANTHROPY COMMUNITY THROUGH SHARING AND COLLABORATION**

Exponent Philanthropy invests in and creates opportunities for sharing and collaboration among lean funders; it also facilitates connections between lean funders and other influencers in the philanthropic sector.

Outcomes

- Exponent Philanthropy creates more points of connection between our organization and the individuals within our community of lean funders.
- Members of our community experience deeper connections with one another.
- Target audiences have increased affinity for and identification with Exponent Philanthropy and our mission to amplify and increase the impact of lean funders.

Strategies

- Invest in outreach and engagement strategies that increase the number of lean funders who access Exponent Philanthropy's offerings.

- Implement an ambassador program to encourage currently engaged lean funders to tell others about Exponent Philanthropy.
- Leverage media relations and partnerships to build awareness of Exponent Philanthropy and our community of lean funders.
- Create more opportunities for in-person and virtual connections among lean funders.
- Invest in technology to foster and sustain connections, collaboration, and peer learning among lean funders.
- Establish and deepen relationships with philanthropy-related organizations; increase their awareness of Exponent Philanthropy and leverage their expertise to create new resources and programs.

GOAL 3

ADVANCE DIVERSITY, EQUITY, AND INCLUSION IN PHILANTHROPY

Exponent Philanthropy cultivates a culture that advances diversity, equity, and inclusion within our organization and among our community of lean funders.

Outcomes

- Exponent Philanthropy's board and staff are sensitive to society's systemic and cultural inequities and how equitable and inclusive practices result in greater philanthropic impact.
- Exponent Philanthropy's board and staff are diverse, creating opportunities for a variety of perspectives to influence and guide our work.
- Our community of lean funders is sensitive to society's systemic and cultural inequities and how equitable and inclusive practices result in greater philanthropic impact.
- Lean funders implement equitable philanthropic practices, resulting in greater impact.
- Our community is representative of those it serves, creating opportunities for a variety of perspectives to influence philanthropy.

Strategies

- Audit and implement internal policies and procedures that result in an increasingly welcoming and equitable work environment.
- Conduct regular trainings for our staff and board to advance a culture based on trust, equity, and the organization's core values.
- Design programs and resources specifically for lean funders that provide practical guidance on diversity, equity, and inclusion best practices.
- Implement a communications strategy that builds awareness of our internal DEI journey and the journey of lean funders.

GOAL 4

MAXIMIZE OUR RELEVANCE AND ACCESSIBILITY TO A VARIETY OF FUNDERS

Exponent Philanthropy offers valuable, easily accessible resources to a wide variety of funders throughout their philanthropic journey.

Outcomes

- Funders of all experience levels report greater perceived value of Exponent Philanthropy.
- Our community offers a strong value proposition for target audiences, particularly volunteer-led or leanly staffed foundations and funders using donor advised funds.

- Our offerings engage target audiences regardless of membership status.
- Exponent Philanthropy provides accessible offerings in a variety of formats aligned with user preferences.

Strategies

- Conduct a needs assessment of underserved audiences, particularly seasoned funders and individuals and families using donor advised funds, to guide the creation of new offerings that provide value to all lean funders throughout their philanthropic journey.
- Identify and reduce barriers that may prevent lean funders from engaging with Exponent Philanthropy's offerings and activities.
- Invest in technology and other strategies to enhance lean funders' experience accessing our resources, providing them with relevant information quickly, easily, and affordably.
- Create and curate resources that position Exponent Philanthropy as the central hub for all information relevant to lean funders.
- Invest in organizational capacity, through staff trainings and/or external resources, so Exponent Philanthropy is helpful and responsive to a diverse audience of lean funders.

