

# The Echoing Green Fellowship: Our Philosophy of Fellow Support

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## Foreword:

Over the past five years, Echoing Green has invested in growing our Fellowship program, tripling it from 14 organizations supported in 2009 to 42 in 2014. This strategic decision to support more emerging social entrepreneurs stemmed from an organization-wide growth plan that first recognized Echoing Green’s leadership in the early-stage social change space, and then committed to increasing our impact through supporting more Fellows each year. Accordingly, we have also seen a rise in the number of applicants (941 in 2009 to 2726 in 2014), reflecting the growing trend within the millennial generation to start something good in the world. Our “Priming the Pump” public-private partnership with USAID, General Atlantic, Newman’s Own Foundation, The Pershing Square Foundation, and Rockefeller Philanthropy Advisors, allows us to achieve and diversify this growth, with a goal to support 100 organizations by 2016, including more people working in the developing world.

Selecting more Fellows also requires an investment in internal capacity. To that end, Echoing Green has developed a more systematic approach to Fellow support, including structuring Fellows into a cohort-based model with dedicated Portfolio Managers, and introducing the Individualized Fellow Plan (IFP) and integrating it into standardized support processes. This Philosophy of Fellow Support now also guides all of our conference structures – the IFP building blocks define the arc of our New Fellows Retreat, and its themes permeate our workshop programming at our All Fellows Conference.

Though the IFP and the Portfolio Manager are key to a Fellow’s development, the strength of Echoing Green has always been the community. In our 27 years of existence, we’ve found that Fellows learn best from each other. As the number of Fellows in the network grows, we have responded by facilitating interactions in subgroups divided along various “slices” – namely program area and geography. Specifically, as the number of non-US-based organizations continues to grow (116 in 2009 to 222 in 2014), we have started convening them in small groups—first in South Africa in 2011, and then in India in 2012. Through these events we realized the power of gathering in new environments: this cross-pollination of

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ideas, perspectives and movements offer a great benefit to not only those who do work in those regions but also to Fellows from across the globe. This year, with the support of USAID, we will be hosting our first international All Fellows Conference in Mumbai in November, bringing together over 150 of our active Fellows (across 10 cohorts), impact investors, and thought leaders for a full itinerary of peer learning, workshops, presentations and advisory sessions.

We are excited to see what comes next with this continued growth – both in the depth and breadth of supporting our Fellows in their journey toward big, bold change. We welcome any and all feedback along our trajectory, starting with this philosophy document of Fellow support.

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## OVERVIEW

Echoing Green’s mission is to unleash next generation talent to solve the world’s biggest problems. We have a human capital approach to social entrepreneurship and so we structure our Fellowship program accordingly. Aside from the seed funding, health insurance, professional development stipends, multi-day leadership retreats and conferences, we offer individualized and on-going support to each entrepreneur, in the context of the broader Echoing Green network, as they grow as leaders in the social sector.

Echoing Green recently adopted an aggressive plan for program growth. As part of our planning process we made an effort to clarify, and document, the approach we have been using and evolving for the past 25 years. Echoing Green embraced a vision to “Deepen, then Grow” our Fellowship programs. This means that before we turn our attention more fully toward expanding the number of Fellows in our portfolio, we aim to improve and solidify our efforts to support the Fellows we already have.



**OUR PHILOSOPHY: An Individualized Fellow Plan, in the hands of a Portfolio Manager, at the center of the Echoing Green Community, will lead to the lasting success of early stage social entrepreneurs.**

The key is a flexible use of judgment – we don't have a one-size-fits-all curriculum, but we have tools that allow us to support our diverse group of Fellows where they need it.

**Individualized Fellow Plan (IFP)**

Each year, beginning at the New Fellows Retreat (the incoming class' introduction to the Fellowship), all Fellows participate in preparing an informal written document that identifies their current strengths and weaknesses and identifies the areas where Echoing Green is best placed to be helpful over the course of the two years and beyond. *(see Appendix for a sample IFP)*

**Portfolio Manager**

Our Fellow cohorts are powerfully diverse on almost every imaginable spectrum – personal background, geography, issue area, corporate form, etc. For that reason, it is impossible for our Portfolio Managers to truly be issue-area experts for every Fellow they support. Our aspiration instead is that, at any given time, they may be able to serve one or more of the five following roles:

- Connector - Is the best positioned to help a Fellow access the tremendous resources in the Echoing Green Community;
- Expert Advisor – Can, where possible and justified, drawn on personal experience and expertise to help a Fellow solve key organizational challenges;
- Thought Partner – Serve as an extra brain to think critically, as smart generalists, through any sort of issue a Fellow may face, such that they don't have to do it alone;
- Confidant – Will listen, without prejudice, to professional and personal challenges; and
- Advocate – Promote a Fellow to potential donors and peer institutions, awards or even for opportunities within Echoing Green itself.

**The Echoing Green Community**

The true strength of the Echoing Green Fellowship experience is the ability of our Fellows to identify and access the deep wisdom of the concentric circles of our community, which includes:

- The Fellow's own cohort (e.g., The Global Class of 2012)
- All 642 Fellows



- The wider world of friends and partners to Echoing Green – including our Board of Directors, Social Investment Council, Donors, Advisors, Consultants, etc.

## A CLOSER LOOK AT THE IFP

Although an Individualized Fellow Plan must reflect the unique circumstances of a particular Fellow, we have come to believe that there are at least four basic building blocks of success for any early stage social entrepreneur, regardless of issue, location, corporate form, etc.

We aspire that all Fellows, by the end of the initial two-year phase of their Fellowship:

### **1. Can raise money in appropriate amounts for their stage and size of need.**

None of our Fellows' internal or external goals are possible without financial resources – whether from philanthropy, earned income, or investment. Fellows are not assessed on the absolute value of their financial resources, but on a flexible approach that considers the progress they ought to be making and the scale that their ambition requires.

### **2. Operate according to clear, written short-term plans and goals.**

Although an opportunistic, entrepreneurial mindset is required of early-stage leaders, one common pitfall is the desire to pursue all paths and opportunities at once. Often, this lack of focus is driven by pursuit of a newly attainable donor or investor. Fellows need to have a clear set of short-term goals, and stick with them until they truly have learned enough to make an informed change.

### **3. Internalize a philosophy of regular measurement against a documented theory of change.**

To really make change in the world, Fellows must have clarity on their desired impact and a commitment to honest and rigorous evaluation. Very early stage organizations, however, may need time to clarify a theory of change, settle on a program model, and see any measurable impacts. It may not make sense for our Fellows to be hiring researchers and establishing control groups from day one – so our goal for them is simply that they demonstrate their longer-term commitment to rigorous evaluation.

### **4. Remain committed to keep working on their issue and/or organization, at a high level of passion and energy, in the years after their Fellowship.**

An innovative idea and organizational leadership skills are worthless if the leader is burned out. Part of Echoing Green's unique perspective is our focus on the individual leader. And while we would be delighted to see our Fellows change the world through the organization



they are starting now, we are hopeful that their passion for social change lasts a lifetime, even if this particular organization does not.

One example of our focus on this issue is our Chaplaincy program, where a secular chaplain is on-call 24 hours/day to support Fellows in their more personal challenges.

NOTE: There may be areas of organizational and personal growth that are as important to any individual Fellow as these four building blocks. The building blocks are simply the ones we believe to be universal. Each Fellow’s IFP also includes 2-3 other areas that may only be relevant to that particular Fellow at that time, such as hiring an executive team, building a thought leadership capacity, etc.

### TRACKING PROGRESS - THE FELLOW DASHBOARD

Echoing Green seeks to measure our Fellows’ progress along these building blocks. Our Fellow Dashboard, below, asks each portfolio manager to track success in real time.

ORG	OVERALL	Can Raise Money	Short-term Plan	Philosophy of Eval	Remain Committed	Elective 1: Definition	Elective 1: Rating	Elective 2: Definition	Elective 2: Rating
Org 1	5	4	4	5	4	Board	3	HR	3
Org 2	5	5	4	5	4	HR	3	Marketing	3
Org 3	4	3	4	3	4	Sales	2	Public Speaking	3
Org 4	4	3	4	4	5	Website Coding	3	Marketing	4
Org 5	3	3	3	4	5	Mgmt	3	Project Finance	2

### CONCLUSION

Echoing Green has been supporting early stage social entrepreneurs for 25 years. We believe deeply in the power of a diverse community of social entrepreneurs to support one another, along with a bit of direct support from a team of thoughtful portfolio managers. But we continue to learn, make mistakes, and identify new opportunities every day. We fully expect our approach to continue evolving over the next 25 years.



## FOR FURTHER READING

Some useful articles include:

- [The Meaning of Social Entrepreneurship, Greg Dees](#)
- [Not Everyone Should Be A Social Entrepreneur, Lara Galinsky](#)

Finally, Echoing Green has learned tremendously from others in the field, and hopes to continue to do so. Learn more about some of our allies in this field:

- [The Draper Richards Kaplan Foundation](#)
- [Ashoka](#)
- [The Unreasonable Institute](#)
- [Village Capital](#)

We are eager to hear from you. To order reprints of this note or to share feedback, please contact [info@echoinggreen.org](mailto:info@echoinggreen.org).



## APPENDIX A: SAMPLE INDIVIDUALIZED FELLOW PLAN (IFP)

### Individualized Fellow Plan for: Fellow A of Organization X

**Bold Idea:** XXXXXXXX

**IFP Date Created:** 10/22/2013

#### **BB1: Can raise money in appropriate amounts for their org stage and size of need.**

Current Status: Fellow has successfully funded Organization's first project in partnership with a local foundation. Their financial position currently is satisfactory and sufficient to fund on a per project basis, but in the near term Fellow would like to raise a round of investment to build operations and infrastructure (marketing, communications and scale). The primary focus currently is to cultivate a second project and revenues for any subsequent contract. Fellow is still applying for philanthropic grant and prize money – with a goal for \$300k by end of the fiscal year (currently at \$100k) – this will remain a part of the organization's medium to long-term fundraising strategy because they have a dedicated volunteer resource to do these submissions. Several things need to happen before Fellow will be ready to seek investors:

- Financials in order: Fellow is currently using Quickbooks but does not have financial statements prepared; needs to demonstrate a viable financial model
- Growth strategy: Fellow needs to formally articulate growth plans in a pitch deck format

#### Goal for Fellowship:

1. Implement accounting system and have dedicated account/ financial management support
2. Update investment package and articulate growth strategy

#### **BB2: Operate according to clear, written short-term plans and goals.**

Current Status: Fellow's short term focus is to finish initial project in the first location and then pursue the next location for impact. Fellow is currently at a cross-roads and waiting on funding decisions to decide on next organizational move. Organization has growth opportunities in another urban hub that could start within the next 3 months if they start engaging partners now. If Fellow had enough funding he would prefer to build out his team further before starting a second location. Part of Fellow's challenge with committing to short-term plans is that he is so integrally involved in the execution of his current projects he isn't able to devote a sufficient amount of time to developing a pipeline of growth potential.



Ideally this will diminish over time as Fellow trains new team members and there is appropriate knowledge transfer. Until then, Fellow will have to make time to consider these strategic decisions about the organization's growth and consider the current capacity very carefully.

Goal for Fellowship:

1. Finish build-out of first location.
2. Close contract on second location.
3. Hire a COO.
4. Build out a team with enough support to allow Fellow to focus on pipeline and future programs while executing current projects.
5. Create thoughtful expansion timeline, including cost and operations projections.

**BB3: Internalize a philosophy of measurement and evaluation against a documented theory of change.**

Current Status: Fellow believes that building their program provides long-term benefits to the immediate and surrounding communities. With this first location Fellow has identified a few key metrics to track and demonstrate this positive impact on the community. Eventually this will require long-term evaluation studies but at this stage Fellow needs to identify metrics that can be easily tracked across all future programs and ensure they have the systems to collect these over time. That, coupled with adequate research and correlating studies, will provide a proxy for indicating long-term social impact.

Goal for Fellowship:

1. Determine the metrics that will be relevant to all programs/communities of impact; correlate to existing studies and demonstrate expected social impact.
2. Create a more automated system of gathering data in current and future programs.
3. Plan to analyze data regularly to make sure the program is on-track in terms of intended impact.

**BB4: Remain committed to keep working on their issue and/or organization, at a high level of passion and energy, in the years after their Fellowship.**

Current Status: Fellow is currently feeling very committed and enthusiastic about Organization's work. He is slowly acclimating to the first community and attempting to make more time for personal relationships and recreation. This year he will take his first personal vacation in three years. Fellow sees himself being committed to Organization for the long-term.





Goals for Fellowship:

1. Fellow will think critically about expansion of location based on his own ability to manage multiple sites.
2. Fellow will reflect once a month about his own capacity for the work – and seek to hire for what he cannot handle.
3. Fellow will commit to take at least 1 weekend off each month and at least 1 week vacation every year.

**Elective 1: Marketing (branding / marketing strategy / communications / storytelling)**

Current Status: Fellow has a vision for his brand but needs to create a strategy to streamline and execute on marketing and communications. It will be critical for Organization’s growth over time in what could become a competitive landscape.

Goal for Fellowship:

1. Work with a marketing consultant on the mission and message of Organization.
2. Work with a storytelling coach on how to best convey the message of impact.
3. Keep website/social networks/presentations/literature up-to-date at all times for customers/partners/investors.

**Elective 2: Thought Leadership**

Current Status: Fellow is seeking opportunities to write and speak about his work and learning in a public setting.

Goal for Fellowship:

1. Understand when it is the right time to be able to do this (both on a business cycle and knowledge basis)
2. Identify opportunities for speaking engagements to the appropriate audience.
3. Start a blog on behalf of the organization.

Both Fellow and Portfolio Manager agree to this Individualized Fellow Plan on \_\_\_\_\_ and plan to work together to achieve these goals over the course of the Fellowship.

\_\_\_\_\_  
Fellow

\_\_\_\_\_  
Portfolio Manager

