



## EXECUTIVE SUMMARY

# Strengthening Philanthropy's Capacity to Engage in Policy: Progress Report on United Philanthropy Forum's PolicyWorks Initiative

September 2018

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## Key Findings

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Nine years ago, United Philanthropy Forum (then called the Forum of Regional Associations of Grantmakers) started a capacity-building initiative intended to prepare regional philanthropy-serving organizations (PSOs) for individual, collaborative and collective policy work at local, state, and federal levels. To achieve this goal, the Forum has provided its regional PSO members (and now increasingly its national PSO members) with a wide range of support, including ongoing opportunities for peer learning and sharing, policy-focused webinars, an annual PolicyWorks Institute, an annual policy capacity assessment and profile, and much more. This report highlights key areas of progress for the Forum's PolicyWorks initiative during its first nine years, based on the responses of 32 regional PSOs.

### The capacity of regional PSOs to support and conduct policy work has improved dramatically since 2009

- The share of regional PSOs allocating some staff time to focus on policy work (either part-time or full-time) increased from 45% in 2009 to 84% in 2017.
- Most regional PSOs (87%) now facilitate relationship-building between their philanthropy members and local or state policymakers, up from 43% in 2009.
- Only a third of regional PSOs (35%) provided resources and tools to help their members effectively engage with policymakers in 2009, compared to 71% in 2017.
- Less than a quarter of regional PSOs (21%) provided educational briefings directly to policymakers about timely public policy issues in 2009, but 68% reported doing this in 2017.

### Growth of Regional PSOs on Key Policy Capacity Indicators, 2009–2017

	2009	2017	Change
% of regional PSOs			
Allocate some staff time to policy	45%	84%	+39%
Facilitate relationships with policymakers	43%	87%	+44%
Provide policy resources & tools to members	35%	71%	+36%
Provide briefings to policymakers	21%	68%	+47%

### Regional PSOs continued to grow their capacity to engage in public policy in the past year, and cite the Forum as helping support this growth

- Most regional PSOs (83%) said they improved their understanding of current trends related to policy issues in 2017, and 96% of these PSOs reported that the activities and resources provided by the Forum directly (68%) or indirectly (28%) supported this change.
- Nearly all regional PSOs (94%) increased the flow of policy information to their members last year, with 82% of these PSOs reporting that this was supported by the Forum either directly (50%) or indirectly (32%).
- Nearly three-quarters of regional PSOs (71%) conducted education and outreach activities with their members in 2017 to raise awareness about how and why grantmakers should help to ensure an accurate census count, and 96% of these PSOs said the Forum supported these efforts directly (68%) or indirectly (28%).

### Areas of Regional PSOs' Policy Activity Growth in 2017

	% of regional PSOs saying they engaged more in this activity in 2017	% of these regional PSOs saying Forum supported this change
Improved understanding of current policy trends	83%	96%
Increased flow of policy info to members	94%	82%
Engaged more in 2020 census activities	71%	96%

## Regional PSOs are increasingly making strategic decisions related to staffing and financial management to improve the sustainability of their policy work

- The share of regional PSOs reporting that their staff had the right mix of skills and expertise to achieve the current policy work objectives increased from 45% in 2016 to 56% in 2017.
- Similarly, more PSOs reported that the allocation of staff time for policy work is clear and adequate to achieve their policy work objectives, from 29% in 2016 to 44% in 2017.
- About a third (35%) reported that adequate budget was assigned to support the achievement of current policy work objectives and that the performance against the budget regularly monitored, up from 23% in 2016.

### Areas of Regional PSOs' Policy Capacity Growth in 2017

	2016	2017	Change
	% of regional PSOs		
Staff have right mix of skills & expertise to achieve policy objectives	45%	56%	+11%
Allocation of staff time for policy work is clear & adequate to achieve policy objectives	29%	44%	+15%
Adequate budget to achieve policy objectives	23%	35%	+12%

## About the Forum

United Philanthropy Forum leads, strengthens and informs a national network of nearly 75 regional and national philanthropy-serving organizations (PSOs) that advance philanthropy's impact for the common good. We envision a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

Forum members represent more than 7,000 philanthropic organizations, making us the largest network serving philanthropy in America. The Forum is creating a new kind of philanthropic network that brings together regional PSOs' deep regional roots and connections with national PSOs' deep content knowledge and reach. Given our network's scale and scope, we can lead change and increase impact in philanthropy in a deeper and broader way than any other organization.

To learn more about Forum membership, please visit: [www.unitedphilforum.org/join](http://www.unitedphilforum.org/join).

This report can be downloaded from the Forum's website at: [www.unitedphilforum.org/policyworksreport2018](http://www.unitedphilforum.org/policyworksreport2018)

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