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WASHINGTON, D.C.



## SUGGESTED KEY MESSAGES

### #FOTH2023 Advocacy Teams

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#### OVERVIEW OF KEY THEMES AND MESSAGES

During FOTH 2023, philanthropy has the opportunity to educate legislators about the most important policy issues for our sector. To ensure that we as a sector deliver a clear, unified message, the Forum and our #FOTH2023 partners, Council on Foundations and Independent Sector, recommend the following talking points for #FOTH2023 Hill visits:

1. The Value of Philanthropy and How We Collaborate
2. Public Policy & the Philanthropic Sector
3. Sector's Legislative Focus

*\*These messages are meant to be used as a guide, each Delegation is free to tailor their approach, as needed.*

#### MEETING INTRODUCTIONS

- We represent over (*# of members*) foundations that operate in our state/region. Our members work on a variety of issues to support the state/region/district and strengthen our communities.
- As needed, explain difference in types of foundations (private, public, operating, corporate).
- Our members have invested (*amount of money invested*) in the state/region/district through over the past (*X year/s*).
- *SHARE THE FOUNDATION STORIES: 1 or 2 foundations share a short story about how grantmaking is impacting the community in that state and/or district.*

#### THE VALUE OF PHILANTHROPY AND HOW WE COLLABORATE

##### Philanthropy Is Valuable to Our Country

- The tradition of American generosity has a vibrant, unique history and is a big part of what distinguishes America from the rest of the world. Giving in our country is ever evolving and deeply intertwined in the American story. Americans gave \$485 billion to charities in 2021 to help their communities.
- While giving increased during the first 3 quarters of 2022, [it failed to keep up with inflation and the number of donors shrank by 7%](#). Additionally, the number of small donors (donating less than \$500) has fallen much more than larger donor categories. Funds from small donors make up only 9.3% of total funds raised. This drop in donors is concerning to us.
- The charitable sector works alongside, but separate from, the institutions of government and business. This allows citizens to freely choose how to make society a better place through their own initiatives, including those that help communities impacted by inequitable public policy.

##### Philanthropy as a Collaborator

- Philanthropy offers more than just grantmaking. We convene organizations, facilitate collaboration, share knowledge, and pool resources. The charitable sector plays a valuable and important role in collaborating with the public sector to leverage public investments and ensure a healthy democracy.

## PUBLIC POLICY & PHILANTHROPIC SECTOR

### Philanthropy Seeks to Promote a Strong Sector and Advocate for Healthy, Vibrant Communities

- The future of American generosity is not guaranteed. Public policy is crucial to preserving the spirit and capacity of American generosity and eliminating systemic and structural inequities that persist.
- The charitable sector supports policies that encourage and protect giving, lead to equitable outcomes for communities across the country, and strengthen democracy.
- We seek Congress' support on policies that encourage giving, strengthen the nonprofit sector, address inequities, allow us to focus on our charitable missions, and effectively utilize our resources to maximize our impact.
- As proposals impacting the sector are considered, know that we are a resource to your office. Please reach out to understand the full impact proposals will have on our work, grantmaking, and the communities we serve.

## STRONGER CHARITABLE GIVING INCENTIVES

- Congress should restore and expand the universal charitable deduction, which was created most recently in bipartisan COVID relief legislation and extended on a bipartisan basis through 2021.
- Every American's access to the charitable deduction is a matter of fairness. It helps charitable organizations achieve their missions and support their workforce and communities.
- Although Americans will give to nonprofits without any giving incentives, these incentives have been proven to encourage Americans to give more, helping communities in need. For example, after the temporary universal charitable deduction expired in 2021 there was sharp decline in small donors in the first half of 2022 vs. the first half of 2021:
  - \$100 or less contributions – 17% fewer donors
  - \$101-\$500 – 8% fewer donors

## NONPROFIT SEAT AT THE TABLE LEGISLATION

- The nonprofit sector is America's third-largest employer and has been a trusted partner to government, but unlike all other sectors it has no formal seat at the table within government.
- In the previous Congress, H.R. 7587 – the Nonprofit Sector Strength and Partnership Act – proposed establishing a White House Office on Nonprofit Sector Partnership, Interagency Council, and Advisory Board comprised of nonprofit sector leaders. This three-part structure would leverage the knowledge, trusted status, and reach of nonprofits to craft and implement better solutions for all.
- The legislation – which is pending reintroduction – will also make our sector stronger and enable nonprofits to better serve their communities by scaling effective solutions, cutting red tape, and meeting the unique needs of nonprofit workers.

## ADVOCATING FOR VIBRANT COMMUNITIES

- In addition to providing funding and resources to communities across the country, the charitable sector's voice is critical to advocating for policies that help those communities thrive, long term.
- As a sector we support practical public policy solutions that catalyze a just and equitable society where all can participate and prosper.
- Post-graduation scholarship grant programs can stimulate regional economic growth, strengthen a community's workforce, and help address the growing student debt crisis. Federal law should treat post-graduation scholarships like traditional scholarships, a charitable activity."
- The sector supports a strong and vibrant democracy in America. A democracy that encourages participation in the democratic process, protects citizens' right to be counted, right to vote, and provides fair representation, without restriction and interference.

