



UNITED PHILANTHROPY

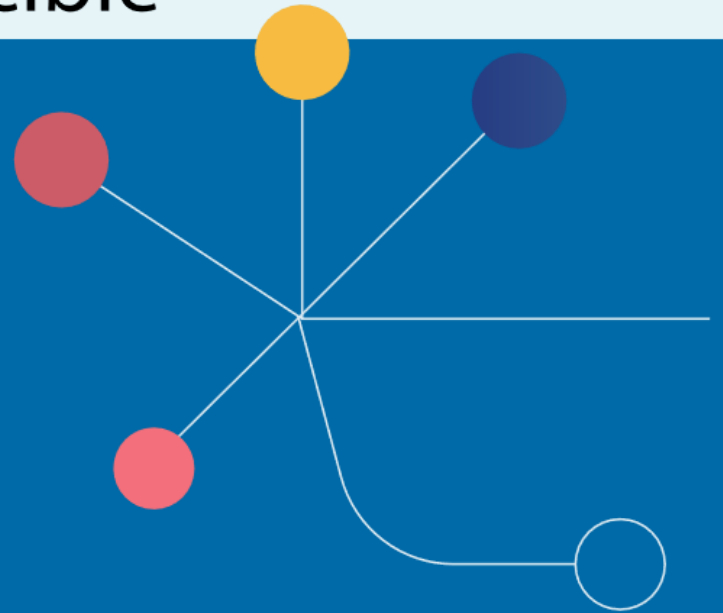
**FORUM**

A network for the common good



EXECUTIVE SUMMARY

# The COVID-19 Crucible



How Philanthropy-Serving Organizations  
Responded to the Pandemic and  
Are Adapting in a New Landscape

**W**e often hear about the accelerating pace of change. Every era seems to grapple with it, and in every era there's a tendency to think change is happening faster than ever—and it probably is. But what is the COVID-19 pandemic if not the ultimate proof of that concept? This has been disruption at its swiftest and least predictable. In a matter of weeks, office environments went remote, work went virtual, and in-person interaction ceased. Self-care became the watchword and social isolation the norm. While much of the everyday business of society slowed to a crawl, funders had to pick up the pace, as communities were suffering and the public and nonprofit institutions that support them were pushed to the brink. All this took place in an atmosphere of fear, uncertainty, political turmoil and scarce information.

Philanthropy-serving organizations (PSOs) were seemingly made for this test. A formalized network was in place. Connections that had already existed among members of United Philanthropy Forum solidified into joint responses. Past forays into public policy had seeded relationships that bore immediate fruit in the form of emergency cross-sector calls and responses. Ongoing work on equity gave leaders lenses to see and share how the pandemic was affecting marginalized communities and act on their behalf. PSOs' long track record as trusted sources of information made it clear where to go to hear the latest. Out of existing networks grew tight-knit communities of practice.

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Among the myriad shifts experienced by PSOs in the wake of the pandemic, a few stood out.

- **Going virtual with their membership was seen as a game changer.** In some ways, it made the game harder. How to create the same three-dimensional experience—the spontaneous and informal interactions that happen in person, a sense of belonging and make things human—on a flat screen? But there were benefits, too. Programs became more accessible. Geographic barriers were bridged in an instant. The frictions of car and air travel disappeared. PSOs' members were able to bring up questions, share resources, and find connections in real time through chat features.
- **For these and other reasons, PSOs found that the pandemic ushered in a new era of member engagement and perception of value.** Thrust into a whirlwind, funders often looked to PSOs as the anchor. “We engaged as many members in one quarter as we had in the previous two years,” one PSO leader said. “Our members feel closer to us, and we feel closer to our members,” another leader reflected a few months into the lockdown.
- **In uniquely urgent circumstances, isolation begat collaboration.** The pandemic appeared to accelerate the shift in PSOs toward more collaborative learning and collective action. Funds were mobilized. Work with government partners increased. Advocacy efforts took hold. Peer cohorts on issues like racial equity, public health, and crisis communications intensified their work. At the same time, while the pandemic made collaboration imperative, the new virtual medium made it harder to do.
- **Life in the wake of COVID-19 drove innovation.** Many PSOs experimented with new moves. One leader likened the shift to becoming more like advocacy organizations—bold, nimble, focused on action. “Pop-up” strategies and “open mic” sessions were

devised. New streams of work on program-related investments and impact investing were developed. Staff members were thrust into new roles. Organizational cultures changed.

- **As people found themselves working harder and faster to navigate new and unfamiliar territory, they increasingly took a step back to create space and grace with each other.**

Bounced around by the rapids, they needed time to get to the riverbank and reflect. Creating that unstructured open space can be counterintuitive for conscientious practitioners who want to be sure programs are designed thoroughly enough that people feel they're getting their money's worth. And a tendency toward over-scripting can be a common hazard, particularly in virtual settings, where order feels at a premium and looseness in design can feel like a waste. But sometimes just getting the chance to talk and share is exactly what people are seeking, especially during a traumatic time. As the lockdown persisted, PSOs began to make more time for check-ins and more space for self-care.

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## Looking Back

PSOs took on an array of activities to respond to the pandemic and became vital hubs for philanthropy for their foundation members and other partners.

- **Most PSOs became instant information aggregators and hubs for funders and others**, with 87% of PSOs serving as a clearinghouse for funders' pandemic responses and other critical data and information. Nearly every PSO developed a resource page on their websites, sharing updates from the field, information about response funds, insights from the sector and learning opportunities.
- **Two-thirds of PSOs partnered with those in sectors outside philanthropy (government, nonprofits, business, etc.)** as part of their COVID-19 response efforts. In particular, the pandemic prompted many PSOs to engage with government in new and innovative ways.
- **More than half (54%) of PSOs mobilized funding** for communities most impacted by COVID-19, often housing and managing collaborative funds for pandemic response. For many PSOs this was a new role for them.
- **Many PSOs led advocacy and policy efforts regionally and nationally**, with 57% of PSOs issuing policy or advocacy statements (calls to actions, policy positions, etc.) and 45% of PSOs advocating for COVID-related legislation at the local, state and/or federal level.
- **BIPOC-led PSOs with a long history of centering racial equity were key leaders** in being advocates for centering racial equity and fighting against racism in philanthropy's response to the pandemic.

## Looking Forward

During the inquiry for this project, one consistent theme heard from PSO leaders was there's no going back. Leaders not only recognized that the post-pandemic landscape in which PSOs and the philanthropies they serve now operate has

fundamentally changed. They also acknowledged how much their organizations have changed, and they emphasized that those evolutions should be named, celebrated and extended. There are numerous learnings from PSOs' response to the COVID-19 pandemic that can have implications for the future work of PSOs themselves and for the broader philanthropy sector. Here are some key learnings for the sector:

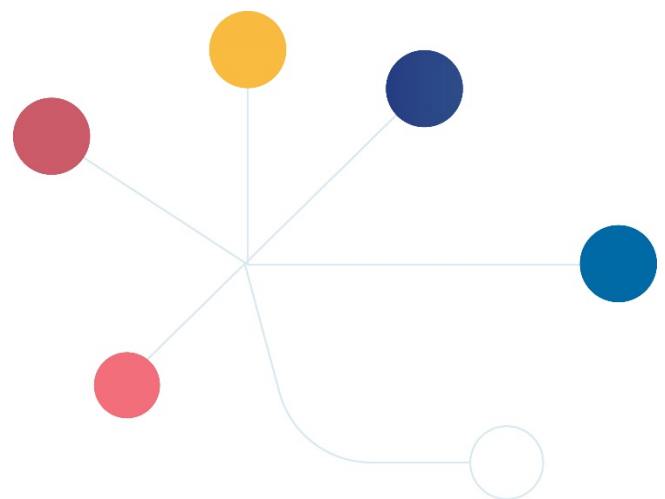
- **PSOs have become more transformative, less transactional:** PSO board and staff leaders increasingly think and talk about their PSO as a unified community rather than an organization and its members. In turn, more PSOs are approaching member financial support as investments in mission-critical efforts rather than dues in exchange for services. This shift parallels the increasing emphasis on PSOs' networking (collaborative level of work) and advocacy (collective level of work) roles during the pandemic. Members still looked to PSOs for information and resources, but they also saw PSOs as platforms for leadership and action, in the sector and beyond.

**The pandemic was a case study in the power of networks in responding to a crisis—and the need to build those networks in advance.**

- **A central focus on racial equity and accountability:** Leaders of PSOs increasingly recognize their important role in pushing philanthropy to center equity—racial equity in particular—in its work, practices and policies. The pandemic and its effects put the issue of racial equity in sharp relief. For many leaders, the racial equity conversation is ultimately an accountability conversation. How can philanthropy hold itself accountable to its values, to taking the kinds of actions it expects from those it funds, to reckoning with power dynamics in the sector, and to generally meeting

this moment? And PSOs are increasingly recognizing their potential roles in holding accountability conversation.

- **New kinds of bold PSO leadership:** Outside the philanthropy sector, this leadership is taking the form of increasing numbers of partnerships, with government but also the private sector. These partnerships multiplied and intensified in response to the pandemic and show no signs of going away. Inside the philanthropy sector, PSOs are stepping up to a unique challenge: finding the right balance between holding the whole and moving the whole. How to meet members where they are and then support them on a journey, whether on racial equity, public policy engagement or trust-based philanthropy? How to take a strong stand while keeping a big tent?
- **A renewed focus on networks:** The continued nurturing of PSO networks and their peer-to-peer connections is vital to philanthropy. The pandemic was a case study in the power of networks in responding to a crisis—and the need to build those networks in advance.



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### About the Forum

As the largest and most diverse network in American philanthropy, United Philanthropy Forum holds a unique position in the social sector to lead change and increase impact in philanthropy. We are a membership network of more than 90 regional and national philanthropy-serving organizations (PSOs) who work to make philanthropy better, representing more than 7,000 foundations and other funders across the country. The Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

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

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