

# Philanthropy Ohio Legislative Agenda

2023



Philanthropy Ohio is a statewide membership organization for philanthropic funders. Our mission is to lead and equip Ohio philanthropy to be effective partners for change in our communities. Our members include foundations, corporate giving programs and other funders and individuals actively involved in philanthropy in Ohio. Together, our members hold over \$50 billion in assets and provide over \$4 billion in grants annually to nonprofit organizations.

Advocacy is a critical component of what we do. As the leading voice for Ohio philanthropy, we prioritize four areas of policy: the strength of the charitable sector, education, health and housing. Philanthropy Ohio is recognized as a national and state leader in advocacy. We believe our public policy work is integral to strengthening philanthropy's work and the communities they support.

While we continue to be an independent and non-partisan voice, when appropriate, we take positions and lobby on state and federal legislation. The Philanthropy Ohio Board of Trustees votes on such positions as recommended by the Public Policy Committee.

We engage in public policy by:

- Informing our members about key federal and state policies and their impact on organized philanthropy;
- Educating our members about their role in federal, state and local issues;
- Enhancing the capacity of philanthropic organizations to engage in advocacy;
- Building strong relationships with federal and state policymakers;
- Convening policymakers and philanthropy around critical issues; and
- Advocating on behalf of philanthropy.



*Philanthropy Ohio members and staff gathered in Washington D.C. during Foundations on the Hill in March 2023 to encourage elected officials to support key legislation, inform them about the unique and vital role charitable giving plays in America and gain their support for the philanthropic sector.*

# Guiding Principles

## Diversity, Equity, Inclusion and Belonging

To have a true impact in a diverse and complex world, organized philanthropy must commit to including all voices as we intentionally and authentically engage on issues of diversity, equity, inclusion and belonging. Therefore, Philanthropy Ohio supports public policies that address systemic disparities and produce equitable outcomes for all Ohioans.

We recognize that our society is challenged to overcome racism and that discrimination is a powerful driver of unequal individual and group outcomes. Thus, we commit ourselves to seek out and advocating for equitable solutions. Likewise, we encourage foundation leaders to commit themselves and their organizations to intentionally advancing diversity, equity, inclusion and belonging through their community leadership and grantmaking.

## Building Stronger Communities

Philanthropy Ohio recognizes that lasting community change requires partnerships with government and non-governmental leaders. When we collaborate, we can leverage our collective resources to better understand complex problems and more effectively scale promising solutions.

In service of building stronger communities, Philanthropy Ohio educates members about the policies that impact their communities, creates opportunities for members to convene with policymakers and supports initiatives and affinity groups that address specific member needs.

## Building Stronger Philanthropy

We are committed to supporting a strong philanthropic sector at the state and federal levels. We do this by educating policymakers about the impact of our work and where philanthropic priorities intersect with government priorities.

Additionally, we support public policies that promote the effective management of charitable resources, transparent and ethical conduct and reasonable access to information.

Philanthropy Ohio encourages voluntary self-regulation efforts within the sector and supports appropriate external enforcement agencies for nonprofit compliance and oversight.

Our work related to tax reform envisions a future where the federal and state tax codes are an effective and appropriate tool that strengthens the tradition of Americans helping their neighbors in need; fosters the growth and sustainability of civil society's nonprofit institutions; promotes communities using local resources to address local issues; and helps to build the economic security of all Americans.



*Philanthropy Ohio members attend a press conference on the universal charitable deduction in front of the United States Capitol Building during Foundations on the Hill in March 2023.*

# 2023 Federal Legislative Agenda

## Federal Issues

### Promotion of Charitable Giving

Philanthropy Ohio supports income tax credits, deductions and other vehicles that provide an incentive for increased charitable giving.

### Donor-Advised Funds (DAFs)

Philanthropy Ohio promotes the availability of donor-advised funds as a viable charitable giving vehicle (with operating policies that are consistent with National Standards for Community Foundations). We support legislative reforms for DAFs that help to promote ethical and accountable management of the charitable resources in these funds for the public good, without compromising the privacy of the donor, and oppose legislative reforms that inhibit or diminish the reasonable growth and effectiveness of donor-advised funds.

### Private Foundation Payout

Philanthropy Ohio supports an appropriate payout level for private foundation distributions that allows for the availability of funds for distribution in perpetuity.

### Protection of Endowments

Philanthropy Ohio works with policymakers to support current laws protecting and promoting endowments within the philanthropic sector.

### Tax Reform

Our efforts focus on educating federal policymakers, advocating for policies that:

- Allow the greatest flexibility in how Americans use their assets to make charitable donations, with donors having a broad choice of assets from which to make charitable donations;
- Treat charitable giving equitably for individuals at every income level, with donations of cash and property to public charities and private foundations deductible at the same rate;
- Reduce complexity, as long as simplification does not adversely impact charitable giving and other principles;
- Provide for a stable and certain climate conducive to charitable giving; and
- Ensure an appropriate level of regulation for charitable organizations.



*Members met with U.S. Department of Education Director of Strategic Partnerships Shital Shah about post-graduation reverse scholarships to addresses student debt, labor shortages and help graduates achieve economic success at Foundations on the Hill in March 2023.*

# 2023 State Legislative Agenda

## Education Policy

Philanthropy Ohio and its members have prioritized statewide education policy for over a decade. Through education-centered programming, the Education Initiative helps funders better understand and address education reform in Ohio. Additionally, the members of the Initiative work with staff to develop and adopt bi-annual policy priorities.

### 2023/2024 Education Policy Priorities:

- Advance anti-racist and anti-discriminatory policies and practices in P-20 education.
- Improve access to whole-child comprehensive supports in schools across the state.
- Invest in high-quality early childhood education. Support early literacy and two-generation approaches.
- Ensure students have access to high-quality educators by investing in recruitment and retention efforts.
- Anchor the state's school funding system in adequacy, predictability and equity.
  - Make significant investments in K-12 education, particularly for students of color, those living in low-income households or rural areas and those with other needs.
- Position Ohio's students on solid pathways through K-12 education, post-secondary education and into careers.
- Boost college affordability by:
  - Increasing statewide FAFSA completion rates, related professional development and family supports; and
  - Increasing investments in Ohio College Opportunity Grants and expanding eligibility to more students.

## Health Policy

Since the passage of the Affordable Care Act, Philanthropy Ohio and the Health Initiative members have prioritized statewide health policy. The initiative aims to bring relevant health policy information to its members and develop bi-annual policy priorities.

### 2023/2024 Health Policy Priorities:

- Advance anti-racist and anti-discriminatory policies;
- Allocate American Rescue Plan Act (ARPA) dollars to investments that are likely to positively impact groups who have been disproportionately impacted by the COVID-19 pandemic;
- Improve access to mental health services;
- Improve birth equity (reduce racial disparities in maternal mortality/morbidity, birth outcomes and infant mortality);
- Maintain access to public benefits (such as Medicaid and SNAP) for people who are eligible; and
- Pursue innovative approaches to addressing the social determinants of health through Medicaid/Medicaid Managed Care Organizations (MCOs).

## Housing Policy

Philanthropy Ohio supports access to fair and equitable housing programs and works in partnership with strategic partners to educate public officials about the role of philanthropy in advancing stable, equitable housing and ending homelessness in Ohio. Moving people into permanent housing through proven best practices is critical to ensuring homelessness is rare, brief and one-time. It is important that philanthropy work in a public-private partnership model identifying where funds can be leveraged and create innovation and collaboration.

## Philanthropy Ohio Public Policy Leadership

### Public Policy Committee

Keith Burwell\*  
Co-Chair, Greater Toledo Community Foundation

Jill Miller\*  
Co-Chair, bi3

Raphael Allen  
Springfield Foundation

Cindy Andrews  
Community Foundation of Lorain County

Meghan Cummings\*  
Greater Cincinnati Foundation

John Dedrick  
Charles F. Kettering Foundation

Angela D’Orazio  
Sisters of Charity Foundation of Cleveland

Megan Folkerth  
Interact for Health

Lisa Hamler-Fugitt  
Ohio Association of Foodbanks

Renee Harvey  
Cleveland Browns Foundation

Connie Hawk  
Licking County Foundation

Heidi Jark  
Fifth Third Foundation

Cecilia Kaltz  
Cleveland Browns Foundation

Melissa A. Kleptz  
The Troy Foundation

Ben Kroeck\*  
Dominion Energy

Angela Lloyd  
Ohio Access to Justice Foundation

Emily Lungard  
The George Gund Foundation

Adam Nation  
Mt. Sinai Health Care Foundation

Michael M. Parks  
The Dayton Foundation

Cinnamon Pelly  
Individual Philanthropist

Kristen Rost\*  
Nationwide

Tyler Sussman  
Chan Zuckerberg Initiative

Nick Turner  
The Nord Family Foundation

Brian Wagner\*  
Muskingum County Community Foundation

Megan Wilson\*  
The Cleveland Foundation

Ashlee Young  
Interact for Health

**Housing Stability Affinity Group**

bi3  
Licking County Foundation  
Nationwide  
The Nord Family Foundation  
Sisters of Charity Foundation of Cleveland  
Springfield Foundation  
Greater Toledo Community Foundation  
The Troy Foundation

### Education Initiative Members

Athens County Foundation  
CenterPoint Energy Foundation  
Chan Zuckerberg Initiative  
Greater Cincinnati Foundation  
Cleveland Browns Foundation  
Cleveland Foundation  
Community Health Foundation  
The Dayton Foundation  
Dominion Energy  
The Bill & Melinda Gates Foundation  
The George Gund Foundation  
Martha Holden Jennings Foundation  
Charles F. Kettering Foundation  
KnowledgeWorks Foundation  
Community Foundation of the Mahoning Valley  
Mathile Family Foundation  
Muskingum County Community Foundation  
The Nord Family Foundation  
Nordson Corporation  
Foundation  
Peg’s Foundation  
Saint Luke’s Foundation  
Scioto Foundation  
Sisters of Charity  
Foundation of Cleveland  
Springfield Foundation  
The Stocker Foundation  
The Frank M. Tait Foundation  
The Raymond John Wean Foundation

### Health Initiative Members

AIDS Funding Collaborative  
bi3  
CareSource Foundation  
Cleveland Foundation  
The Columbus Foundation  
Community Health Foundation  
Greater Cincinnati Foundation  
The George Gund Foundation  
The HealthPath  
Foundation of Ohio  
Interact for Health  
Community Foundation of Lorain County  
Community Foundation of Mahoning Valley  
McGregor Foundation  
Nationwide  
Ohio Access to Justice Foundation  
The Ohio Association of Foodbanks  
Peg’s Foundation  
The Mt. Sinai Health Foundation  
The Nord Family Foundation  
Osteopathic Heritage Foundations  
Saint Luke’s Foundation  
Sisters of Charity  
Foundation of Cleveland  
Three Arches Foundation  
The Woodruff Foundation

*\*board member*

## The Philanthropy Ohio Policy Team



Carrie Arblaster  
VP, Public Policy

Carrie Arblaster is the vice president of public policy at Philanthropy Ohio. As the lead staff for pursuing the organization's policy priorities and state and federal legislative agendas, she serves as the main point of contact for state agencies, the General Assembly and the Governor's Office.

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Adrienne Wells  
Director, Public Policy

Adrienne Wells is the director of public policy and leads the Education Initiative at Philanthropy Ohio. Having worked with the initiative since its inception, Adrienne brings a wealth of knowledge to her work.

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Grant Stahl  
Manager, Public Policy

Grant Stahl supports the work of Philanthropy Ohio's Health Initiative and the general work of the public policy team. A recent graduate of Kent State, Grant is eager to take what he learned in the classroom and apply it to his work at Philanthropy Ohio.

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### ABOUT PHILANTHROPY OHIO

Philanthropy Ohio is an association of foundations, corporate giving programs, individuals and organizations actively involved in philanthropy in Ohio. Its mission is to lead and equip Ohio philanthropy to be effective partners for change in our communities. It provides the network, tools and knowledge to help people engaged in philanthropy become more effective, powerful change agents in their communities. Together, its nearly 200 members hold over \$50 billion in assets and provide over \$4 billion in grants to nonprofit organizations that work to improve the lives of community residents.