



## History of United Philanthropy Forum

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### Late 1940s

#### First grantmaking associations

The Conference of Southwest Foundations (now Philanthropy Southwest), a multi-state regional association, begins holding annual conferences in this period, and officially organizes in 1948. Its annual conference draws grantmakers from across the country in its early years. The Council on Foundations (COF), the first national membership association of grantmakers, forms in New York City in 1949.

### 1970s

#### The “Regional Association Decade”

A series of tax policy threats galvanizes grantmakers to act at a regional level, and the majority of regional associations form during this period. Geographically, these regional associations define their region as a metropolitan, state or multi-state area.

In 1971, the Association of Black Foundation Executives (ABFE), a national association membership organization that promotes effective and responsive philanthropy in Black communities, was founded as a working group and later became an independent membership organization. ABFE was the first Council on Foundations-recognized “affinity group” of grantmakers—national associations and networks that bring funders together primarily around funding issues and population groups. ABFE’s founding members organized a like-minded group of people in philanthropy because they recognized and acted on the urgency to bring diversity and inclusion to, and equity in philanthropy.

### Late 1970s

#### Beginnings of national structure in services to regional associations

In the late 1970s, the Council on Foundations appoints an informal committee on area associations, comprised of the executive directors of some of the more established regionals. That group generally functions as a liaison between grantmakers and the Council.

### 1981-1991

#### COF Special Committee of Regional Associations

Membership in a Special Committee consisting of the CEOs of all regional associations of grantmakers grows from 14 to 24 over this 10-year period. When this decade began, 12 of these 14 regional associations report a total of 1,097 member grantmakers. Recognizing the need to partner with its regional counterparts, COF provides services including managing several meetings a year; an annual survey of regionals; distributing a regional association newsletter; and responding to interest in starting new regional associations of grantmakers.

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### **1990-1991      Feasibility study on increased support for regional infrastructure**

The W.K. Kellogg Foundation funds a planning grant to formally assess needs, study ways to increase the organizational capacity of regional associations, and develop needed services and materials. The resulting recommendation leads to a specific multiyear collaboration between COF and regional associations, following the increased number and size of regional associations and the growing complexity of the needs of their member grantmakers.

### **1992-1995      The Regional Initiative (TRI)**

The collaboration between the Council on Foundations and regional associations results in The Regional Initiative, a four-year collaboration of 24 regional associations and Council, with a distinct management and policy structure. Five national working groups comprised of regional association staff, Council staff, and member grantmakers advance the Initiative's planning at this point. The Initiative has two dedicated full-time project staff. Throughout this period, the Council continues separate but concurrent support for regionals, through a small staff and program budget.

### **1996-1998      Forum of Regional Associations of Grantmakers created as a three-year test**

Because of the resulting benefits to all regionals, and the more equal partnership that emerged between regional associations and the Council, all parties explore an autonomous structure to continue the goals and benefits of the Initiative once it ended in 1995. The resulting new entity is still a special project of the Council, but quickly develops its own identity, steering committee, and budget, which for the first time includes dues from members. In mid-1997, a national funder collaborative approaches the Forum of Regional Associations of Grantmakers to lead of a major new initiative and grantmaking program, New Ventures in Philanthropy.

### **1998-1999      The Forum emerges as a separate national organization**

By 1998, because of the Forum's acceptance in the field and its increasingly valued services to the regional infrastructure of philanthropy, incorporating as a separate organization became the goal. Now with 29 regional association members, the Forum network grows to represent more than 4,000 grantmakers and other philanthropic stakeholders in 41 of the 50 states. Almost 185 professional staff now work for the Forum's member regional associations. The working relationship between the Forum and the Council strengthens during these years. However, the increasingly distinct nature of this growing national network of regional associations and collaborative opportunities it faces, lead both the Forum and the Council to determine that the time had come for the Forum to be separately structured for independent decision making.

At the end of 1998, the boards of both the Forum and the Council approve the formation of the Forum as a separate 501(c)(3) supporting organization. The Council electively contributes to the Forum's operating budget along with a number of private grantmakers; regional associations themselves contribute annual dues. The Forum develops its own board, audit, president, staff, and policies. It also continues the multimillion-dollar initiative to promote and grow philanthropy, New Ventures in Philanthropy, a service component that distinguishes it from COF, while still complementing the Council's work.

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**1990s**

### **Growth of affinity groups and other national philanthropy associations**

Concurrent with the growth and formation of the Forum and regional associations during the 1990s was the formation and growth of many new national Council on Foundations-recognized affinity groups. By the end of the 1990s, the Council recognized 38 affinity groups. Several other prominent national associations of grantmakers formed in the 1990s as well, including the Association of Small Foundations (now Exponent Philanthropy) in 1996 and Grantmakers for Effective Organizations (GEO) in 1997.

**2004**

### **The Forum's Knowledge Management Initiative**

Inspired by the wealth of information and learning opportunities generated by the first phase of New Ventures, the Forum begins a knowledge management (KM) initiative designed to capture, organize, and make available electronic resources generated by members and other key stakeholders. The end result allows participants to leverage the tools and resources that had been only available regionally.

**2004**

### **First comprehensive study of funder networks is conducted**

Amid the recent creation and growth of many more regional associations, affinity groups and other philanthropy infrastructure organizations, the first comprehensive study of funders is conducted by GEO in partnership with the Council on Foundations, the Forum and The Funders Network for Smart Growth and Livable Communities, with support from the David and Lucile Packard Foundation. The report, *Funder Networks in Action: Understanding Their Potential for Philanthropy*, analyzes funder networks' characteristics, membership, staffing and governance as well as their priorities and challenges, and shows that sustainability-related issues are the key challenges for funder networks. The report notes that "the recent proliferation of funder networks provides the most concrete evidence of the desire among grantmakers to coordinate and leverage their philanthropic investments," and expresses a hope that the report's findings can help surface strategies for better "networking of the networks."

**2005**

### **Forum begins building grantmaker effectiveness and accountability initiative**

The Forum launches a major initiative to increase philanthropic effectiveness and fulfillment of the public trust at the regional level. The Forum begins a major effort at this point to have the regional associations adopt guiding principles and provided grants, tools and materials to facilitate their work. The Forum also starts a national teleconference series for grantmakers on accountability and transparency topics marketed through the regional associations. The Forum works in partnership with the Council on a new curriculum, which is intended to be delivered by the regional associations.

**2006**

### **Grantmaker education project begins**

The Forum in 2006 receives a three-year grant from the Hewlett Foundation to help strengthen grantmaker education at the regional level.

- 2008**      **Forum implements 18-month strategic plan and announces strategic alliance with Council on Foundations**
- In August, the Forum board of directors adopts an 18-month strategic plan, “Recapturing the Power and Potential of the Network.” The overarching concept is that “The Forum” is the network of regional associations and that the strength, connections, and knowledge of The Forum are the strength, connections and knowledge of the regional associations.
- The Forum and the Council announce in October an important and far-reaching strategic alliance to align the services of both organizations to better serve the field of philanthropy.
- 2010**      **Forum adopts 2010-2012 strategic plan**
- Building on the previous strategic plan, the Forum network adopts a new three-year strategic plan. The plan seeks to build a Forum network that can strengthen individual regional associations, make use of and support the spirit of collaboration among infrastructure organizations, and add value to the entire philanthropic field. As an outcome of this plan, the Forum facilitated relationships between regional associations and colleague organizations including Grantmakers in Aging, D5, Campaign for Grade Level Reading, and more.
- 2012**      **PolicyWorks for Philanthropy Initiative becomes a project of the Forum**
- Starting out as a collaboration between a small group of regional associations, PolicyWorks has grown to include 29 regionals representing 41 states. It seeks to effectively engage regional associations of grantmakers in policy work that helps to ensure a vibrant philanthropic sector able to strengthen communities. As a project of the Forum, the scope of PolicyWorks is to prepare regional associations for individual, collaborative and collective policy work at local, state, and federal levels.
- 2013**      **Board adopts 2013-2015 Forum strategic plan and revamps the Knowledge Management Initiative**
- The 2013-2015 plan aims to continue the momentum of the Forum’s previous plan, build on our strengths as a network, and find ways to increase the network’s impact on members, issues and the infrastructure. The plan identifies four broad goals to increase regional association capacity, improve collaborative action, influence the field, and achieve organizational excellence and sustainability along with eight priority areas of work—core member services, grantmaker education, public policy, technology services, partnerships, supporting leaders, assessment, and sustainability.
- After several years of success, the participants in the Knowledge Management (KM) Initiative revamped and reinvigorated the initiative by upgrading the shared technology platform for greater functionality and improved user experience. The influx of new technologies coincided with the expansion of the initiative to include 25 regional associations, nearly three-quarters of the Forum’s membership.

### **2015-2016      Forum changes legal structure; Board adopts new vision**

2015 saw several milestones for the Forum. First, in April 2015, the Forum received approval from the IRS to change its legal structure from being a supporting organization of the Council on Foundations to being a “standalone” public charity.

In January 2015, facing a CEO leadership transition, the Forum’s board of directors took seven months to examine the Forum’s assets and strengths and determine the appropriate role for the Forum in the philanthropy ecosystem. Forum board members spent several months talking with many regional association CEOs, current and past funders of the Forum, and colleague organizations, including national affinity groups and other funder networks. Forum vetted the vision with a focus group of more than 40 representations of national philanthropy-serving organizations (PSOs) at its 2015 Annual Conference in Baltimore, and received positive feedback overall. As a result of this work, in July 2015, the board of directors approved a new vision for the Forum, building on work done during the Forum’s last strategic planning process. This new vision involved broadening the Forum’s network to bring together the assets of the Forum, with its deep regional roots and broad nationwide reach, with the assets of national philanthropy-serving organizations (PSOs)—specifically national issue-based, identity-based and practice-based affinity groups. Under this new vision, the Forum will be the place where philanthropy’s infrastructure comes together.

During 2015 and 2016, the Forum worked to refine and put into action its new vision through an inclusive, collaborative, iterative and co-designed process with current and new partners, led by a vision design group comprised equally of representatives of regional and national PSOs.

In July 2016, at the Forum’s 2016 Annual Conference in Indianapolis, the Vision Design Group unveiled its recommendations for implementing the Forum’s new vision. Also in July 2016, the Forum’s board of directors approved a plan to open up the Forum’s membership to national PSOs starting in January 2017, and welcomed the first national PSO representatives to the board.

The Forum’s 2016 Annual Conference was itself a milestone, marking the first time that the Forum welcomed the staff and CEOs of national PSOs to attend the conference. Conference attendance more than doubled from just two years ago, as 40 national PSOs brought one or more staff to the event. The conference was a clear demonstration in real time of the potential power of the new, expanded network that the Forum envisioned.

During the last half of 2017, Forum staff worked with the vision design group and board of directors to finalize new membership criteria and related bylaws revisions, a new dues structure and other details for the expanded network. Those details were approved by the Forum board on October 20. In November 2016, Forum members approved revisions to the Forum’s bylaws to expand the Forum’s membership.

### 2017

#### Forum expands its membership and changes its name, creating a new kind of philanthropic network

The Forum reached another milestone in January 2017, when it opened its membership to national PSOs. In the first year under this new membership structure, the Forum welcomed 32 new members, nearly doubling its membership and achieving 160% of its goal. The Forum's new members included three issue-focused national PSOs, nine practice-focused national PSOs, four identity-focused national PSOs, three national PSOs focused on a funder type, and three regional PSOs (including two regional PSOs serving community foundations that did not qualify for Forum membership under the Forum's previous membership criteria). The early positive response to the expanded membership model showed clearly that there was a need and interest for creating the new kind of philanthropic network that the Forum had envisioned.

In July 2017, the Forum revealed its new brand identity and new name: United Philanthropy Forum. The Forum changed its name and identity to reflect the new organization that it had become. The Forum is creating a more **united** philanthropy field, bringing together regional and national philanthropy-serving organizations in a single network. The Forum's members are working together better and smarter to advance, inform and support **philanthropy**. The organization is a place to gather, discuss, interact and lead on critical issues—a **Forum**.

Another milestone in 2017 was the Forum's 2017 Annual Conference in San Francisco, which was the Forum's largest conference ever, attracting more than 250 people—more than 30% above the previous year's record

Also in 2017, Forum staff worked to enhance and expand member services to meet the needs of the Forum's new members. This included creating new Peer Communities, where staff of regional and national PSOs can engage in an ongoing learning community with others who share their job responsibilities, and launching a first-ever Compensation, Benefits & Key Metrics Survey for regional and national PSOs.