As part of its mission to serve, connect, strengthen and champion philanthropy and philanthropic infrastructure in our region, the Southeastern Council of Foundations believes it is essential to be active in the public policy arena, promoting and defending our sector and our members’ work. We seek to encourage a legislative and regulatory environment that promotes the overall well-being of the philanthropic sector, encourages its continued growth, promotes charitable giving at all levels and allows our sector to operate independently, with the best interests of our communities in mind.

We are also aware that the philanthropic sector maintains a high level of public trust – this trust is only earned, and kept, by serving the public good. In order to do so, we must go beyond compliance with the laws and regulations governing our sector. We must also be able to take a stand on issues that could affect the ability of philanthropy to best serve our region and our nation.

To ensure we are ready and well-positioned to champion the field, SECF developed this Public Policy Blueprint outlining ways our organization works not only with its members to deepen their knowledge and engagement on policy issues, but also with policymakers to better their understanding of philanthropy’s role and impact. The Blueprint also describes SECF’s history of working on policy issues and our current and future commitment to promoting and defending our sector.

If you have questions about SECF’s public policy work or would like support engaging with policymakers, please contact Matthew L. Evans, director of public policy and special projects, at matthew@secf.org or (404) 524-0911.

Southeastern Council of Foundations
Connect · Engage · Inspire
From our inception, as an initial response to the 1969 Tax Reform Act, SECF has chosen to be proactive in the public policy space. SECF and its members have understood the importance of participating in the world of public policy as both defenders and champions of the sector. We believe "strength in numbers" is essential to achieving success in state capitols and in Washington, where members empower one another to mount a vigorous defense of philanthropy, educate policymakers and promote the ability of funders to address community priorities.

SECF now finds itself in a unique position to build upon 50 years' worth of work and transform our public policy efforts. Recent surveys of our members indicate a desire for SECF to build a strong presence in Washington by communicating regularly with policymakers, sharing policy positions adopted by our membership and meeting with elected officials on our members' behalf. It is clear that SECF sees value in meaningful public policy engagement: Though many members report only a basic understanding of public policy affecting philanthropy, they recognize its importance and see it as a priority. SECF also benefits from a highly engaged Public Policy Committee dedicated to amplifying the voice of Southern Philanthropy.

This coincides with rising scrutiny of our sector coming out of Washington. The 2017 tax bill severely weakened the scope of the charitable deduction and criticism of donor-advised funds has greatly escalated. Other pressing issues, originating out of both Congress and the Treasury Department, include new taxes on exempt organizations, threats to endowments, the private foundation excise tax and even the elimination of the charitable deduction.
In its 2016-20 Strategic Plan, SECF prioritized renewing its emphasis on public policy programming in order to empower members to defend Southern Philanthropy.

The Blueprint provides an outline of how these objectives can be achieved.

**The core pillars of our public policy approach include:**

1. **Strong Guiding Principles**
2. **Public Policy Committee Leadership**
3. **Public Policy Member Offerings**
4. **Meaningful Government Relations**
5. **Strategic Partnerships**
PRINCIPLES

Strong Guiding Goals & Principles

In 2017, SECF’s Board of Trustees approved the following goals and guiding principles to enable SECF to approach public policy in a strategic way and respond to proposals affecting philanthropy in a manner consistent with our values and mission.

Our Policy Goals

The following policy goals define SECF’s strategic approach to public policy:

- **Sustain the diversity and independence of the philanthropic sector.**
  
  We believe a strong and healthy charitable and philanthropic sector in our region is vital to democracy, the quality of life of all people and communities across the Southeast, and, ultimately, a just and free society.

- **Encourage the growth of philanthropy and charitable giving.**
  
  Public policy must continue to encourage individual, institutional, and corporate generosity in order to sustain a strong base of giving in the Southeast. Providing incentives for charitable giving allows the diverse actors of the philanthropic sector to improve the lives of people throughout the region.

- **Maintain transparency and accountability throughout the philanthropic sector.**
  
  Organizations within the charitable and philanthropic sector must be effective in their work, accountable to their multiple constituencies, and good stewards of their resources.

These goals are used to guide the creation and ongoing assessment of SECF’s public policy principles, and through them SECF’s response to legislative ideas and proposals that may affect the continued strength of charitable giving in our region.
Our guiding principles, with respect to current and anticipated public policy developments at both the federal and state levels, include:

Support for policies that promote and enhance the development and growth of foundations, giving programs and other philanthropic organizations.

Philanthropy provides support and investment in areas where business and government do not. We oppose policies that limit the growth of philanthropy or place unnecessary restraints or burdens on philanthropic organizations.

Support for tax policies that promote and enhance individual charitable giving.

Individual giving is the backbone of philanthropy. We believe tax policy should treat all charitable donations and donors equitably in order to support a broader base for charitable giving. We oppose policies that create disincentives for charitable giving, diminish the value of giving, or reduce an individual’s ability to make charitable gifts.

Support for tax policies that support institutional grantmakers’ effectiveness.

Institutional grantmakers such as private, community, and corporate foundations provide leadership, strategic problem-solving, incentives for broad-based giving and flexible response to community needs. Whether responding to disasters or developing long-term strategies and support for underserved citizens, institutional philanthropy must be free of burdensome tax policies to be effective. We oppose policies that constrain our flexibility to strategically respond to our communities’ needs.

Support for policies that reaffirm the vital role of philanthropic endowments and the sustained public benefits they provide.

Philanthropic endowments offer an ongoing and flexible means of meeting the needs of a community now and far into the future. Without them, our nation’s charitable future would be at risk. We oppose policies that would restrict or constrain the use of charitable endowments for long-term social benefit.

Support for policies that allow philanthropy and charitable giving to address a broad and diverse set of needs.

Philanthropy and charitable giving support the arts, community development, economic development, education, the environment, human services, social justice, and much more. We believe government policies should support equity, diversity and inclusion in philanthropy and not favor any specific type of philanthropy or charity. We oppose policies that create priorities for one charitable purpose over another, and oppose policies that support charitable giving to entities, organizations or groups that promote hatred, violence or discrimination. Finally, we oppose policies that erode the integrity of our sector by blurring the line between philanthropic institutions and political organizations.
The Public Policy Committee was established to identify and monitor the activities of government that affect the interests of SECF members and the philanthropic sector. As such, the committee seeks to educate members as to the importance of public policy engagement, to inform them of the rules governing lobbying and advocacy, and to identify ways members can magnify their impact through strategic interaction with government. Because SECF members are spread throughout 11 states, the committee focuses its energy on both federal and state-specific issues.

Establishing Public Policy Positions

The Public Policy Committee is responsible for proposing policy position statements springing from legislation and other policy proposals. These statements are typically approved by the committee at its quarterly meetings and recommended to the SECF Board of Trustees for adoption.

A subgroup of the Public Policy Committee serves as a rapid response team when policy issues must be addressed before the next full committee meeting. When warranted, this team reviews the significance of an issue’s impact on SECF’s members and the sector as a whole, determines if it is of concern, and whether it warrants a rapid response. For any issue, a designated response team will articulate a rationale for action along with specific recommendations and a timeline. The full Public Policy Committee will be given time to respond depending on the urgency of the situation with final approval from either SECF’s Executive Committee or, if timing allows, the full Board.

Public Policy Committee Leadership

The goal of SECF’s public policy offerings is to effectively inform SECF members about the public policy process and inform policymakers about Southern Philanthropy, its impact across the region, and the need for policies that promote charitable giving and the independence of our sector. In pursuit of these goals, SECF offers its members:

- Resources to inform members about current issues including a monthly public policy newsletter, regular policy webinars and Policy Alerts on legislative and regulatory developments that could affect the philanthropic sector, including those requiring immediate outreach, such as phone calls and emails.
- Programs and events, such as Foundations on the Hill and in-district meetings, designed to build stronger relationships with policymakers both in Washington and at home.
- Tools designed to help members be informed and engaged, including an online portal that allows members to learn about legislation and contact officials directly, as well as policy issue papers and the Southern Trends Report.
RELATIONSHIPS

Meaningful Government Relations

SECF’s outreach efforts are aimed at building, cultivating and maintaining relationships with elected officials, both state and federal, across the Southeast.

At the federal level, the SECF footprint (including the Virgin Islands) is represented by 109 representatives or delegates and 22 senators. At the local level, hundreds of elected officials represent various constituencies in each state and territory. Given the volume of elected officials throughout the footprint, SECF must be strategic in its approach to engagement. The four pillars of this approach are:

- **CONNECT**
  Increase SECF’s visibility within government circles, helping elected officials better understand SECF’s mission and purpose.

- **INFORM**
  Educate lawmakers about Southern Philanthropy, its impact, and what laws help or hinder its success.

- **PERSUADE**
  Advocate on behalf of our membership for or against legislation, in order to persuade elected officials to take specific actions.

- **SUPPORT**
  Garner support from other groups, stakeholders, and partners for public policy efforts, as needed, to successfully increase government officials’ awareness of SECF and Southern Philanthropy.

Strategic Partnerships

SECF works alongside several organizations serving the field through public policy – these include the Council on Foundations, Independent Sector, the United Philanthropy Forum and other philanthropy-supporting organizations. We will continue to build strong and strategic partnerships with groups at the federal, state and local levels. Organizations, including state and local grantmaker associations and nonprofit associations, as well as some federal grantmaker and nonprofit groups, will serve as key partners in engaging foundations in public policy work. SECF will also create opportunities for these groups to connect with each other and learn effective strategies for working at the state and local levels.