

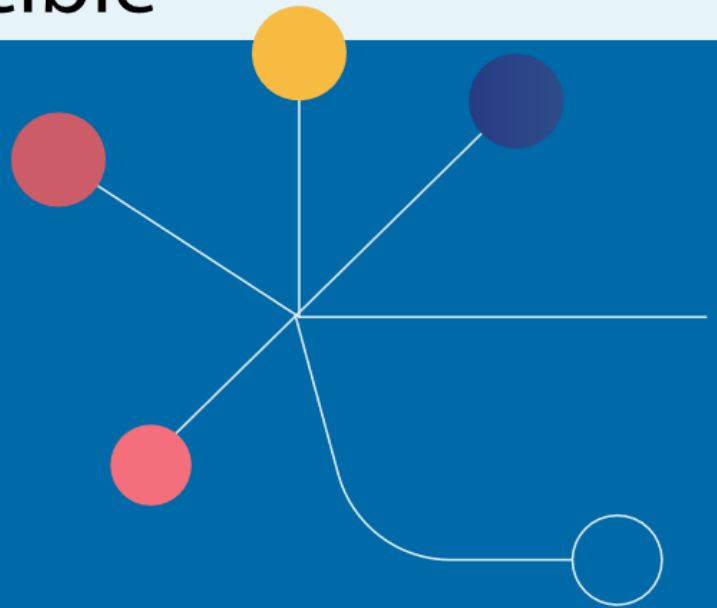


UNITED PHILANTHROPY
FORUM

A network for the common good

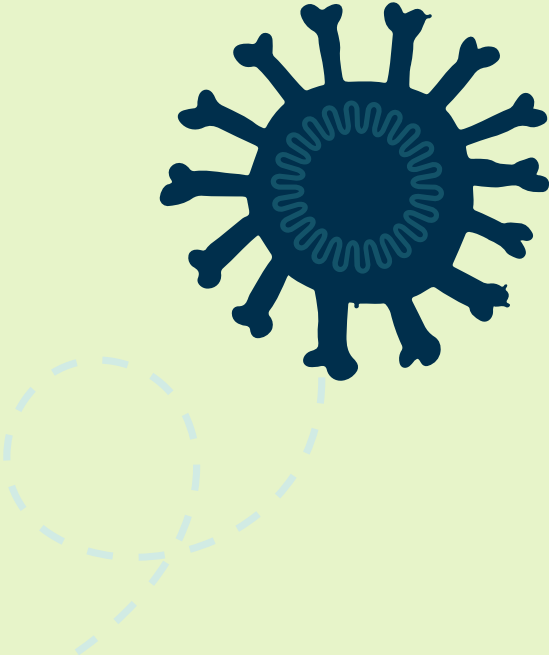


The COVID-19 Crucible



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

Crucible (n): A situation of severe trial, or in which different elements interact, leading to the creation of something new



Contributors

Authors/Researchers – The Giving Practice

Marissa Jackson
Consultant

Mark Sedway
Senior Partner

Leslie Silverman
Partner

Staff Advisors – United Philanthropy Forum

David Biemesderfer
President & CEO

Ivana Bikombe
Senior Associate of Administration & Membership

Courtney Moore
Director of Member Services

Leslie Rose
Communications Manager

Acknowledgements

United Philanthropy Forum thanks all of the PSO leaders who contributed to this report by participating in surveys, focus groups and interviews. We also thank the William & Flora Hewlett Foundation for its financial support that made this report possible.

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.

United Philanthropy Forum

1020 19th Street NW, Suite 360

Washington, D.C. 20036

888-391-3235

info@unitedphilforum.org

www.unitedphilforum.org

@unitedphilforum

© Copyright 2022 United Philanthropy Forum. All rights reserved.

Data and information from this report may not be cited or reproduced without attribution to *The COVID-19 Crucible: How Philanthropy-Serving Organizations Responded to the Pandemic and Are Adapting in a New Landscape* report and United Philanthropy Forum. *The COVID-19 Crucible* report and all related reports are the property of United Philanthropy Forum. Any reproduction, total or partial, and any representation of the substantial content of these reports, or one or more of its components, by any process whatsoever, without the express authorization of United Philanthropy Forum, is prohibited and constitutes an infringement.

Design by MPK&D

CONTENTS

Foreword	5
Report At a Glance: Ten Key Points	6
Methodology and Framework	7
Introduction: Adapting on the Fly	11
Looking Back: How PSOs Responded to the Pandemic	13
Activities	
Examples	
Member Perceptions	
Membership Numbers	
Internal Pivots	
What's the Story Here?	
Looking Forward: Takeaways for PSO Practice	30
External Work	
Internal Work	
Forum Support	
The Board Perspective: Treetop Reflections	37
PSO Response	
PSO Roles	
Philanthropy's Response	
Board Moves	
Conclusion: The Next Doors	45

Foreword


United Philanthropy Forum is pleased to present this report documenting how our nation's philanthropy-serving organizations (PSOs) have responded to the COVID-19 pandemic. The Forum uses "PSO" as something of a catch-all term to describe a diverse and dynamic group of philanthropy associations and networks that bring funders together with a focus on a geographic region, funding issue, identity/population group or philanthropic practice. But as this report demonstrates, PSOs do so much more than "serve" philanthropy. In responding to the pandemic, PSOs have advanced, mobilized, convened, informed and, yes, supported philanthropy, just as they have been doing for many years.

Over the past two years I have watched firsthand as regional and national PSOs have responded in truly astounding ways to ensure that philanthropy was being as effective and impactful as possible in helping our communities tackle a global health pandemic, demonstrating a powerful level of nimbleness, adaptability and flexibility. Almost on a dime, PSOs pivoted to bring funders together in virtual convenings to help them make sense of the pandemic, share what they were doing, and learn from their peers, as well as becoming vital clearinghouses for philanthropy's response to COVID-19. PSOs quickly engaged in new public-private partnerships, led and managed new collaborative funds, advocated for philanthropy and nonprofits in COVID-19 legislation, provided a strong voice of accountability to push philanthropy to respond to the pandemic in the most equitable ways to meet the needs of historically marginalized communities and populations that were most impacted by the pandemic, and much more. They did all of this at the same time that they were quickly switching all of their staffing, services and operations to a fully virtual environment.

The Forum has prepared this report because the COVID-19 pandemic has served as a touchpoint to remind everyone that PSOs are vital leadership organizations for the philanthropic sector in America, and we knew it was important to document their efforts. We also wanted to ensure that we gathered all of the learnings from PSOs' responses to the pandemic to help inform the sector when future crises strike. As noted in this report, the sector needs to be planning now for the next crisis, and PSOs must be an integral component of any plan. United Philanthropy Forum looks forward to working with philanthropy leaders on that planning.

I'd like to thank all of the PSO leaders who contributed to this report by participating in surveys, focus groups and interviews. I'd also like to thank the Forum's more than 90 regional and national PSO members whose pandemic response efforts are summarized in these pages; I am honored to be in community with you. Finally, I am grateful to the William & Flora Hewlett Foundation for its financial support that made this report possible.

Be well,



David Biemesderfer
President & CEO
United Philanthropy Forum

REPORT AT A GLANCE: TEN KEY POINTS

1. The study was conducted in four phases: A **scan** of websites and materials from the regional and national philanthropy-serving organizations (PSOs) that are part of the United Philanthropy Forum network; a **survey** of Forum members to which 55 PSOs responded for a 63% response rate; three video **focus groups** collecting input from 26 PSO CEOs; **interviews** with 13 PSO Board Chairs (See page 7).
2. More than 90% of PSOs **hosted member update calls and held issue convenings** in response to the pandemic. More than 85% served as an **information clearinghouse** for funders' pandemic responses and partnered with those inside philanthropy. (See page 13).
3. Leaders identified a dozen variables they considered in **assessing the impact** of their COVID-19 response (See page 15).
4. PSOs responded to the pandemic in numerous **nimble and versatile ways**. Most frequently, they did the following (See page 16).
 1. Served as information hubs
 2. Created space for collaboration
 3. Developed and deployed tools
 4. Advocated for equity
 5. Mobilized funding
 6. Led advocacy efforts
 7. Produced surveys and reports
 8. Partnered with government
5. In turn, **United Philanthropy Forum responded** by launching the Momentum Fund, participating in joint statements, providing online resources, convening PSOs regularly, and supporting members on public policy responses (See page 20).
6. More than 9 in 10 PSO leaders believe their PSO's response to the pandemic had a positive effect on how **members perceive their organization's value** (See page 21).
7. PSOs made significant **internal pivots** in response to the pandemic, including changes to programs and conferences, member services, and office environment (See page 24).
8. Fifty-five percent of PSO leaders are thinking differently about their **business models** as a result of the pandemic (See page 26).
9. According to PSO leaders, PSO responses can be framed in terms of **five overall stories**: a story about adaptation, a story about collaboration in philanthropy, a story about cross-sector partnership, a story about crisis response, and a story about leadership (See page 28).
10. Looking forward to what the new landscape looks like for PSOs in the wake of the pandemic, leaders shared reflections on **external work** with members and partners, **internal work** in organizational management and capacity; and the **Forum's ongoing work** to support, inform, mobilize and advance the PSO network (See page 30).

METHODOLOGY & FRAMEWORK

We conducted the project in four phases between September 2020 and November 2021.

Scan

The Forum's more than 90 members are regional and national philanthropy-serving organizations (PSOs) that work in many important ways to strengthen, mobilize, lead, inform and support the philanthropic sector. We assigned PSOs into four distinct groups, based on shared characteristics—whether serving a regional or national constituency, and if national, whether their focus is on identity/population group, specific funding issues, or practices aimed to advance the field.¹ Our sample for the Scan phase included 79 PSOs, representing a majority of the Forum's membership

- Regional PSOs (n=38)
- National identity focused PSOs (n=7)
- National issue focused PSOs (n=25)
- National practice focused PSOs (n=9)

We analyzed PSOs' websites, webinars, newsletters, funder briefings, open letters, member emails and materials, member survey findings and ongoing communications to better understand how PSOs were responding in the moment to COVID-19.

Survey

A 22-question survey was sent to all organizations in the Forum network. Fifty-five organizations responded, for a 63% response rate. Questions were organized into four categories:

- *The Organization's External Responses:* What activities did you engage in? Which activities engaged the most members? Which activities had the greatest impact? What effect did the pandemic have on member perceptions of value? What effect did the pandemic have on membership numbers?
- *The Organization's Internal Responses:* What pivots did you make in your internal work? Which pivots will have the most lasting effect? Has the pandemic led to changes in how the organization approaches its business and membership models?
- *The Organization's Member Responses:* What changes are PSOs' foundation members making to their philanthropy practices in the wake of the pandemic?
- *Broader Responses:* Looking back, is there anything you learned in terms of what you wished your organization had done differently or approaches that fell short of expectations? Looking forward, what longer-term changes in your internal or external work are you thinking about in the wake of the pandemic?

¹ While there is a small set of PSOs that focus on funder type, we did not have a significant sample of PSOs to include as a separate group in our study.

Focus Groups

We facilitated three focus groups via video, resulting in input from 26 PSO CEOs and senior leaders in total. The discussions were organized around the following questions:

- What did your PSO have in place that helped you respond to COVID-19?
- What do you wish you had in place to respond to the pandemic or would want in place in the event of the next crisis?
- What is one way that you're thinking about strengthening member engagement in a post-pandemic world?
- What kind of support from and collaboration with your peers, as well as the Forum, do you need in a post-pandemic world?
- What's the main shift in your business model (e.g., in revenue sources, new lines of business, your membership model, new opportunities in your marketplace, etc.) that your organization is undergoing or considering as you look forward?
- What do you think philanthropy leaders should take away from how PSOs have responded to the pandemic over the past year?

PSO Leader Participants:

Name	PSO
Deborah Aubert Thomas	Philanthropy Ohio
John Barnes	Funders Concerned about AIDS
Amalia Brindis Delgado	Hispanics in Philanthropy
Phil Buchanan	The Center for Effective Philanthropy
Kyle Caldwell	Council of Michigan Foundations
Claudia Cummings	Indiana Philanthropy Alliance
Paul D. Daugherty	Philanthropy West Virginia
Satonya Fair	PEAK Grantmaking
Karla Fortunato	Connecticut Council for Philanthropy
Sean Gibbons	The Communications Network
Elisabeth Hyleck	Maryland Philanthropy Network
Monique Jones	Forefront
Joanne Kelley	Philanthropy Colorado
Laurie Liles	Arizona Grantmakers Forum
Kari McCann Boutell	Iowa Council of Foundations
Sammy Moon	Mississippi Alliance of Nonprofits and Philanthropy
Kathryn O'Neal-Dunham	Philanthropy New York
Anjana Pandey	Philanthropy Northwest
Taryn Palumbo	Orange County Grantmakers
Jeff Poulos	Philanthropy Massachusetts
Laura Seaman	League of California Community Foundations
Tony Shields	Wisconsin Philanthropy Network
Katy Smith	Greenville Partnership for Philanthropy
Megan Thomas	Catalyst of San Diego & Imperial Counties
Maria Vizcarrondo	Council of New Jersey Grantmakers
Nancy Wolanski	Grantmakers Council of Rhode Island

Board Chair Interviews

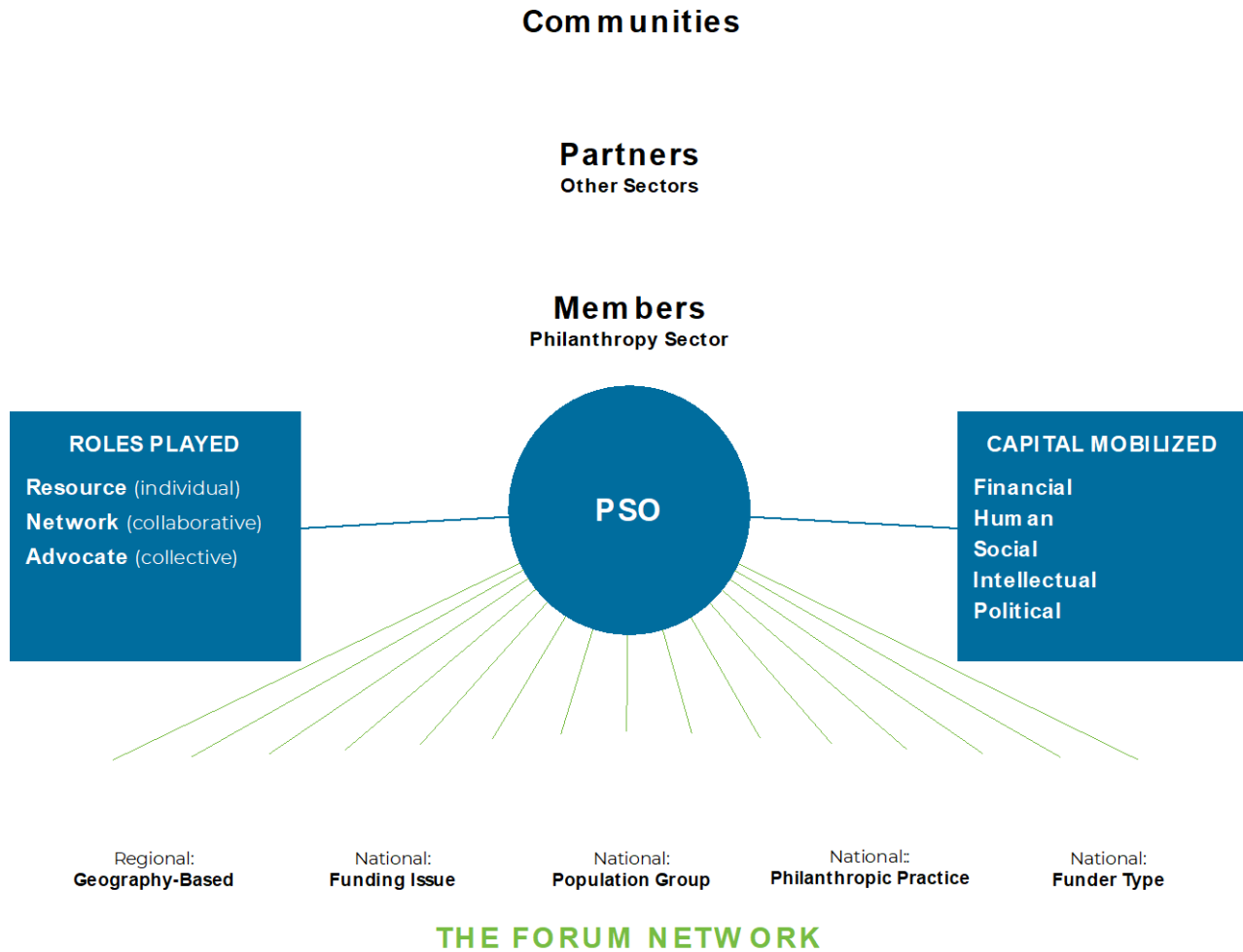
We conducted email interviews with 13 chairs of philanthropy-serving organizations, asking them four questions:

- How would you describe the way your PSO showed up during the pandemic? What were you most proud of? Any big challenges emerge?
- How did your PSO's response influence the way you think about its future strategy and roles?
- From your experience on the board of a PSO, what did you learn about the role of philanthropy during a crisis that surprised you? What would you want stakeholders outside the sector to know about philanthropy's response?
- What is one move that you think is essential for a board to make to effectively guide a PSO during a time of crisis?

Board Chair Participants:

Name	Foundation	PSO
Heather Alderman	Illinois Children's Healthcare Foundation	Forefront
Kenneth Austin	The Wallace Foundation	Philanthropy New York
Steven Casey	John D. & Catherine T. MacArthur Foundation	PEAK Grantmaking
Mesha Davis	Arizona Women's Foundation	Arizona Grantmakers Forum
Lynne Doblin	Richard and Susan Smith Family Foundation	Philanthropy Massachusetts
Leslie Dunford	The Cleveland Foundation	Philanthropy Ohio
Lynne Ferrell	Frey Foundation	Council of Michigan Foundation
Aretha Green-Rupert	Carlson Family Foundation	Minnesota Council of Foundations
Regan Gruber Moffitt	Winthrop Rockefeller Foundation	Philanthropy Southeast
Lori O'Keefe	Triangle Community Foundation	North Carolina Network of Grantmakers
Erica Pelletreau	Ford Foundation	The Communications Network
Rani Snyder	The John A. Hartford Foundation	Grantmakers in Aging
Richard Tate	California Wellness Foundation	Northern California Grantmakers

Framework



Across the four phases of information gathering, our inquiry analyzed PSO responses to the pandemic in terms of:

- Work and impact at four levels: the organization itself, its members (i.e., the philanthropy sector), its partners (i.e., other sectors, including nonprofits, government, business), and the communities they all serve
- PSOs serving in Resource (individual level), Network (collaborative level) and Advocate (collective level) roles
- PSOs helping to mobilize financial, human, social, intellectual and political capital in response to the pandemic and its effects
- Five types of PSOs, organized by: geography, funding issues, identity/population group, philanthropic practice, and type of funder served
- PSOs working with other PSOs in the Forum network

Introduction

ADAPTING ON THE FLY

We 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.

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.

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.

In the pages that follow, we look back on these changes, tracking what PSOs did to help philanthropy and communities respond to the pandemic. That’s Part 1 of the report. We share PSO leaders’ reflections on the pandemic chapter in their institutional story. That’s Part 2. And we look forward, sharing how PSO leaders are thinking about what life in a post-COVID world will look like and how they can adapt. That’s Part 3.

The story here is not only about the extent of PSO pandemic responses, which, broad and deep, were indeed significant. It’s also about how those responses were made possible by evolutionary shifts already underway. Within PSOs and their networks, the pandemic didn’t start change as much as accelerate it. And there’s a future angle at work—how that response is in turn leading to even greater evolutions still.

Many PSOs experimented with new moves. One leader likened the shift to becoming more like advocacy organizations—bold, nimble, focused on action.

Looking Back

HOW PSOs RESPONDED TO THE PANDEMIC

PSOs Took on An Array of Activities

The range of PSO responses to the COVID-19 pandemic was striking.

On average, each PSO engaged in eight of eleven activities covered in the inquiry. Leaders reported experiencing a significant leap in their work.

“Our programming went from 80 programs in a given year to 120, a 50% increase, with no increase in staff,” one PSO leader said. “And it was member and sector driven.”

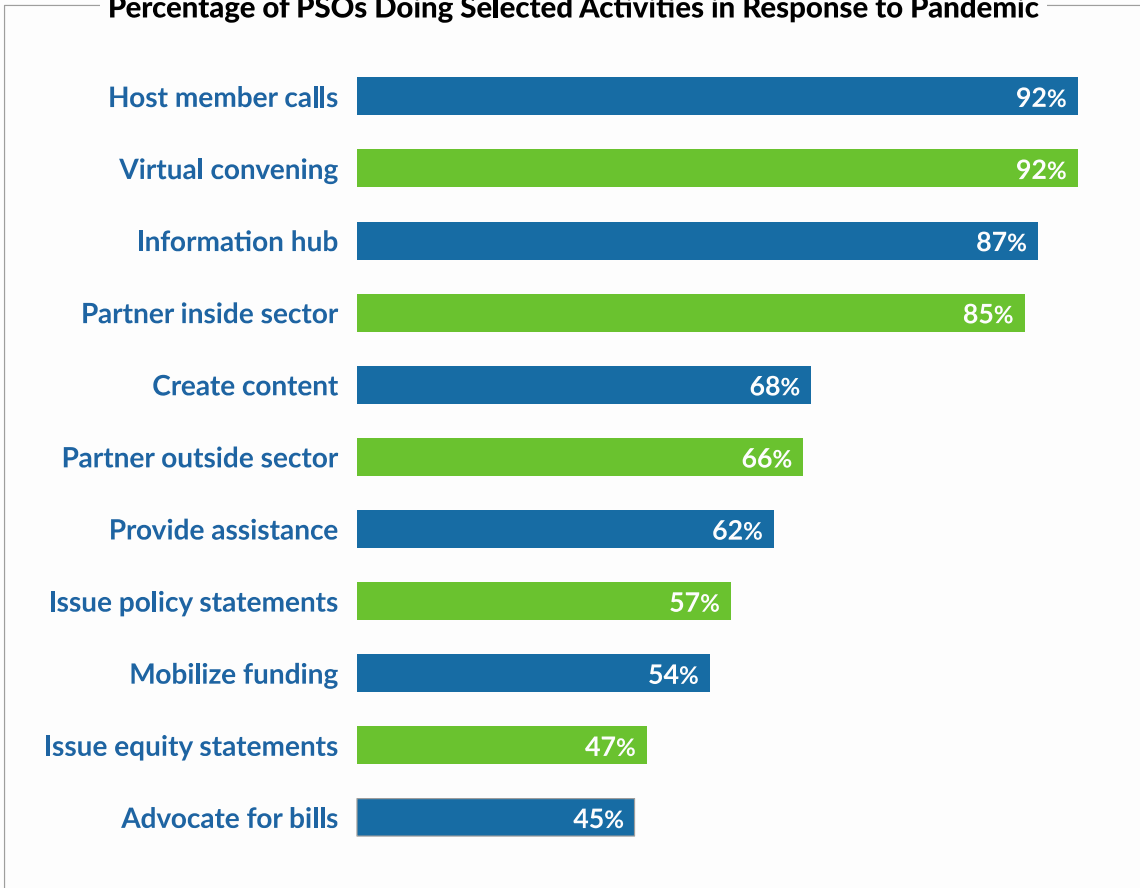
- More than **90%** hosted regular member calls and conducted virtual convenings focused on specific issues related to the pandemic.
- More than **85%** served as an information clearinghouse for funders' pandemic responses and partnered with those inside philanthropy, such as funders and other PSOs.

Philanthropy-serving organizations took on activities as part of their resource and advocacy roles. But it was the network role that they were most likely to play in response to the pandemic, particularly in the beginning, bringing members together for critical updates, peer collaboration and sharing, and virtual learning.

We asked PSO leaders to report on which of the following activities they did in response to the pandemic:

1. Advocating for COVID-related legislation at local, state and/or federal level
2. Creating original pandemic-related content (reports, research, tools, etc.)
3. Hosting regular member calls
4. Issuing public policy-or advocacy-related statements (a call to action, policy position, etc.)
5. Issuing statements focused on the pandemic's impact on marginalized communities
6. Mobilizing funding (creating special funds, identifying opportunities for support, etc.)
7. Partnering with those in sectors outside philanthropy (government, nonprofits, business, etc.)
8. Partnering with those inside philanthropy (such as funders and other PSOs)
9. Providing assistance and tools to members (virtual platform training, simplifying grantmaking practices, communications)
10. Serving as an information hub/clearinghouse for pandemic response support, etc.
11. Virtual convening focused on specific issues related to the pandemic (webinars, conferences, etc.)

Percentage of PSOs Doing Selected Activities in Response to Pandemic



In addition to the frequency of activities, we asked which activities engaged the most members as well as which activities were seen as having the greatest impact. Answers to these questions differed between regional and national PSOs².

For regional PSOs, hosting regular member calls was the activity that engaged the most members.

“Hosting regular member calls gave members and organizations a space to discuss challenges, updates, issues and best practices surrounding the pandemic,” one leader said.

For national PSOs, virtual convenings focused on specific issues related to the pandemic drew the most participants. “Our members needed a centralized place to receive and disseminate information,” according to one leader. “They can operate in silos in other circumstances, but the giant unknown that COVID has proven to be required orchestration and access to multiple sectors beyond just philanthropy.”

Which activities were seen as having the greatest impact? Leaders of national PSOs saw the virtual convenings they held as having the greatest impact among the activities they undertook. Leaders of regional PSOs were split between two activities in their answer to the “greatest impact” question: hosting regular member calls and mobilizing funding.

² National philanthropy-serving organizations bring funder together around a particular funding issue, identity/population group, philanthropic practice or type of funder. Regional philanthropy-serving organizations bring funders together around a geographic area.

Leaders of PSOs were asked how they thought about the impact of these efforts. They identified a dozen variables that they considered in their assessment:

1. Amount of money raised
2. How effectively efforts contributed to systems change and equity progress
3. How effectively they were able to connect members to funding and partnership opportunities
4. How effectively they were able to connect members with each other and provide opportunities for collaborative learning and funding
5. Influence on funder practices (e.g., change in payout in response to the crisis)
6. Member feedback
7. Number of members participating in events
8. Number of members using information and tools
9. Quality and comprehensiveness of information provided
10. Quantity and quality of organizational partnerships and individual relationships established
11. Reports from members' grantees
12. Speed of response

Whether they lead national or regional organizations, PSO leaders consistently focused on the equity dimensions of the pandemic and getting response dollars to communities disproportionately impacted by the crisis. One leader said,

“Our role in mobilizing funding catalyzed relationships that are leading to even more resource mobilization, each building on one another in repeated demonstrations of support to populations in our community otherwise left out of COVID-19 response and recovery funds.”

It also included longer-term efforts to shape recovery. Another leader noted,

“While all efforts have been impactful, advocacy and public policy works gets most directly to the heart of systems change that can advance equity.”

PSOs Responded in Nimble and Versatile Ways

In the pandemic’s immediate and confusing aftermath, PSOs had to leap into action, often with little time to think or plan. They moved to provide space for members to process, learn and reflect. They listened to members and shaped their response accordingly. They collected and shared information. They brokered relationships with

government officials. They created new programs and pivoted and accelerated existing ones.

Following were the most frequent areas of work along with selected illustrative examples.³

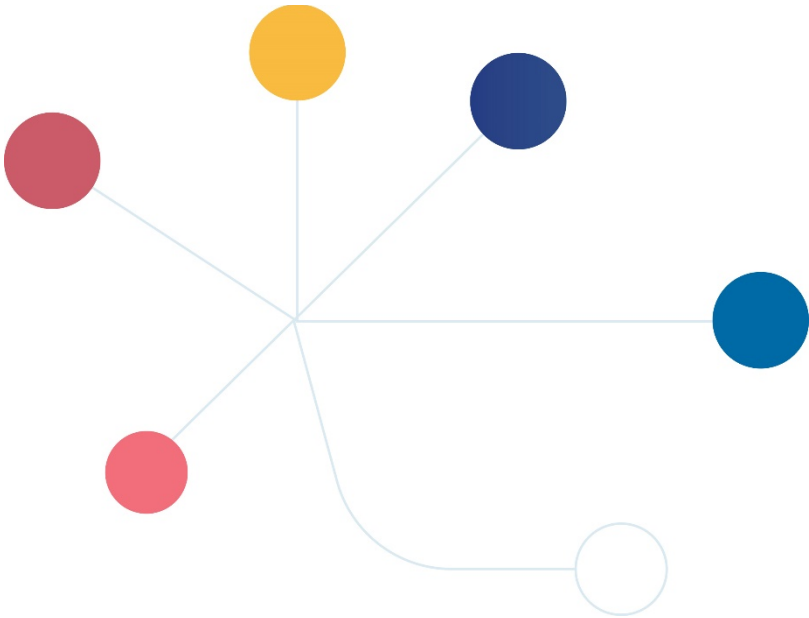
RESPONSE	EXAMPLES
<p>PSOs served as information aggregators and hubs of COVID-19 resources and information. Nearly every PSO developed a resource page on their websites, sharing updates from the field, information about response funds, insights from the sector and learning opportunities.</p>	<ul style="list-style-type: none"> • Forefront’s website featured COVID-19 resource pages that included a nonprofit survey report, recommendations to funders and state officials, public policy updates, and a clearinghouse of funds. • PEAK Grantmaking created a COVID-19 resource page to support grants management professionals to adopt principled, equitable grantmaking practices with urgency in response to the crisis. • Philanthropy Missouri provided a COVID-19 resource page along with a collaborative working document to track collaborations and funder responses.
<p>PSOs created space for members to connect, reflect and collaborate. Many PSOs made member calls a regular—often weekly—part of their programming.</p>	<ul style="list-style-type: none"> • Indiana Philanthropy Alliance mapped member COVID-19 funds and began a monthly “Recovery to Resilience” webinar series. • Mission Investors Exchange held “Open Mics,” lightly structured, flexible calls for MIE members to come together and ask: “What ideas, projects, or resources exist within the MIE community—and how can we help each other respond to the COVID-19 crisis?”

³ Each area of work has multiple examples. Please note that we’re providing snapshots of just two or three illustrative examples for each area, not the comprehensive picture of all relevant efforts.

RESPONSE	EXAMPLES
<p>PSOs developed and deployed tools that amplified existing mission-related work.</p>	<ul style="list-style-type: none"> Center for Effective Philanthropy created an <u>assessment tool</u> to help funders gather a comprehensive picture of what their grantees and other partners were experiencing during the COVID-19 pandemic and related economic challenges. Economic Opportunity Funders released an “<u>Emergency Response and Planning Survey</u>” covering economic security issues related to the pandemic. The Communications Network developed a <u>Crisis Communication Triage Kit on COVID-19</u> to share and crowdsource best practices, resources and examples of effective crisis communications from foundations and nonprofits.
<p>PSOs advocated for centering racial equity and fighting against racism in the sector’s response to the pandemic. Some of the most extensive work in this area was done by identity focused PSOs.</p>	<ul style="list-style-type: none"> ABFE <u>held</u> funder briefings on COVID-19 relief for Black businesses and focused its annual conference, which shifted to virtual, on a range of critical challenges facing Black communities in the pandemic, including redlining, the racial wealth divide, and ensuring relief efforts reach Black communities. Asian Americans/Pacific Islanders in Philanthropy <u>issued</u> an open letter to philanthropy, “The Cure to Viral Racism Is Within Our Hands,” calling for support for groups confronting racism in their pandemic relief efforts. The letter was signed by more than 350 people and organizations.
<p>PSOs released surveys and reports for use by their members and other stakeholders.</p>	<ul style="list-style-type: none"> Funders’ Committee for Civic Participation released a <u>report</u>, “Understanding the impact of COVID-19 on 2020 Census Funders and Grantees.” Technology Association of Grantmakers developed “Call for Funders for Nonprofit Tech Support,” an educational <u>publication</u> for how to support digital infrastructure during COVID-19, working with NTEN and NetHope .

RESPONSE	EXAMPLES
<p>PSOs led advocacy and policy efforts regionally and nationally</p>	<ul style="list-style-type: none"> • Grantmakers Concerned with Immigrants and Refugees mounted an extensive <u>advocacy effort</u> in response to the pandemic. They shared findings from more than 50 interviews with immigrant-serving organizations across California about priority concerns and policy strategies; issued recommendations for government and philanthropic action; and held member programs on immigrant justice, public-private partnerships, immigrant response funds, Census 2020, and other pandemic-related topics. • Philanthropy California, an alliance of Catalyst of San Diego and Imperial Counties, Northern California Grantmakers, and SoCal Grantmakers, had its disaster resilience team coordinate with state agencies and partners to <u>respond</u> to the potential impacts of COVID-19. They also held a series of webinars and town halls on the crisis.
<p>PSOs mobilized funding for communities most impacted by COVID-19.</p>	<ul style="list-style-type: none"> • Hispanics in Philanthropy made <u>grants totaling \$6 million</u> in support of COVID-19 relief efforts in the United States, Mexico, and Central and South America. The funds were raised by more than a dozen funders, recognizing that Latinx people in the United States were more likely to be infected by COVID-19 and to die from it than their white neighbors. • Minnesota Council on Foundations moved quickly to establish the <u>Minnesota Disaster Recovery Fund</u>, partnering with the Saint Paul & Minnesota Foundation to raise and distribute more than \$11 million to more than 1,700 nonprofit organizations and more than 3,000 small businesses. Donors included 56 foundations and donor-advised funds and 123 individuals. • Philanthropy Northwest, in partnership with the state of Washington and major food banks in the state, established the <u>WA Food Fund</u> to respond to the growing food crisis as a result of COVID-19. The fund raised more than \$14 million from 60 philanthropic institutions and 9,000 individual donors.

RESPONSE	EXAMPLES
<p>PSOs partnered with government in innovative ways</p>	<ul style="list-style-type: none"> • Catalyst of San Diego and Imperial Counties partnered with city government to raise and distribute <u>funds</u> to small businesses left out of the Paycheck Protection Program through an equity-centered grantmaking program that they designed and the city subsequently adopted to distribute CARES Act relief funds to small businesses. • Philanthropy Ohio <u>partnered</u> with the Ohio Department of Education to establish the Collaborative Fund for Educating Remotely and Transforming Schools. The fund supported projects to help schools in the state improve remote education practices and in particular address inequitable circumstances related to remote education during the COVID-19 crisis.



The Forum's Response

At that same time that United Philanthropy Forum's PSO members were responding to the pandemic, the Forum itself was also responding to COVID-19 in a variety of ways. The Forum worked to support, convene and inform its members, amplify its members' work, mobilize funding and provide leadership to the field. The pandemic responses of the Forum and its members were often interconnected and reinforcing of each other.

A centerpiece of the Forum's pandemic response was the Momentum Fund. Launched in May 2020, "with a vision of ushering in a new model of philanthropic giving that focuses more explicitly on race, class, and gender." Supported by the Bill & Melinda Gates Foundation, the Fund awarded \$9.1 million in grants to 139 501(c)(3) organizations around the country managing COVID-19 relief funds that provided grants and other forms of direct support to community-run organizations working with communities of color, historically marginalized populations, and other groups being disproportionately impacted by the pandemic. The Fund leveraged the full power of the Forum network, with its intersection of geography, issues and populations impacted by the pandemic. The Forum's PSO members comprised the Fund's Advisory Board and Grant Review Committee, and Forum members played a key role in ensuring that news of the funding opportunity reached the communities and organizations that could most benefit from the support.

The Forum also:

- Convened its PSO members for regular COVID-19 member check-in calls to provide a space for them to share how they were responding to the pandemic and to also bring in experts to help inform their work.
- Issued a joint statement from leaders within the Forum network, "Keep Equity at the Forefront in Philanthropy's Response to the Coronavirus." The statement was the basis for a Letter to the Editor published in *The Chronicle of Philanthropy* in March 2020.
- Joined a group of colleague national philanthropy-serving organizations in signing a joint statement in April 2020 calling on all funders to consider a significant increase in their grant spending during this time of crisis.
- Joined other national nonprofit and philanthropy organizations in advocating on behalf of the sector regarding proposed COVID-19 economic stimulus package legislation.
- Provided information and support to members on public policy aspects of the response to COVID-19, including all related stimulus packages, and analysis of implications for philanthropy and nonprofits.
- Provided a range of online resources relating to philanthropy and PSO responses to the pandemic and its impact on regions, populations, and issues, including a clearinghouse of philanthropic response funds nationwide.

PSOs Saw a Big Effect on Member Perceptions

In their immediate responses to COVID-19, PSOs were focused solely on helping philanthropy address the growing pandemic as effectively as possible. But as time went on, many PSOs observed some unexpected byproducts of their efforts, particularly related to member engagement and perceptions among members and constituents of the PSO's value. According to the survey, the COVID-19 response provided a big boost to PSOs' value perception:

- **94%** of PSO leaders thought their PSO's response to the pandemic had a positive effect on how members perceive their organization's value to them.
- **6%** saw the effect as neutral.
- **0%** said the effect was negative.

Throughout the pandemic, PSOs were able to display their value to their foundation members. They heard consistently from their members that the pandemic had a positive effect on how they perceived their organization. This shift was even more striking because it emerged at the same time that big member benefits, such as in-person conferences, were being cancelled. As has happened in the past, a crisis served as a reminder of the core role and value of PSOs in the philanthropy sector. Some example perspectives on member perceptions of value:

“From the start, we viewed the pandemic as a major opportunity to demonstrate our value to our members through our mission-based, strategic approaches.”

“It gave us an opportunity to step forward as a convener and trusted source of information and support.”

“Members feel informed. They feel part of something bigger than their organizations and our sector as a whole. And they feel we've made their lives easier and their work more impactful.”

“Our data is showing our members using our resources more than ever and we hope that out of this use, they are also seeing more value out of their membership.”

“Our members could finally see how important our work is.”

“We know from data gathering and anecdotally that members highly valued the quality, speed and depth of information we shared to connect, strengthen and mobilize our membership.”

“We saw the greatest engagement from our members that we have ever seen.”

When asked why their members' response was so positive, PSO leaders cited several reasons, including the speed of response, quality of information provided, creation of spaces for connection and collaboration, and providing members opportunities to respond to urgent social, economic and political challenges. More specifically, PSOs suggested that the response to the pandemic was seen as valuable to members because they...

- **Quickly pivoted to provide the resources and support their members needed.** This allowed their membership to better adjust to the new realities of COVID-19. Nearly every respondent to the survey talked about this responsiveness. Tracking what's happening in the external landscape, understanding member needs, pivoting to virtual, providing the latest information—these were the moves of nimble, attentive, connected, relevant organizations. Members noticed.
- **Became clearinghouses of information and curated virtual convenings for action and learning tailored to member needs and interests.** “Our members needed a centralized place to receive and disseminate information,” one leader said. “We have received feedback from our members, both through feedback forms and directly through email letting us know that they appreciated the peer learning spaces, issues expert presentations, collaborative opportunities, and other support we have offered during the pandemic,” one PSO leader said. Another leader reported that, even after the emergency calls stopped, their PSO continues to get member feedback, “that these calls were the most impactful thing we've ever done.”
- **Were able to help facilitate public-private partnerships.** Work across sectors established partnerships, relationships, and muscles that continue to produce results. “Because of our work, members were able to understand federal funds, the impact locally, and how communities can advocate for dollars once relief packages were passed. We have heard from several members that they became more effective advocates with the public sector and with other funders to focus public-private dollars on the needs of vulnerable populations.”
- **Used virtual engagement to make real connections.** For regional PSOs in particular, which tended to offer more in-person programming than national PSOs prior to the pandemic, virtual programming not only expanded participation beyond what it would have been in person but helped members farther away from a regional PSO's geographic center feel like more equal participants than they might otherwise. “The pandemic pushed all our efforts to a virtual space that subsequently bridged the urban/rural divide for us,” one leader reported. “We have had more participation by our rural members than we ever have!” According to the leader of a regional PSO focused on a state and located in a major city, “We became truly statewide overnight when life and work went into virtual mode.” PSOs reported another effect of the shift to virtual: “Prior to the pandemic, much of our programming was provided through affinity groups, which led to a bit of unintended siloing,” one leader said. “We have been doing much more all-member programming during the pandemic, and this has helped de-silo the membership.”

- **Were able to help members leverage large amounts of financial as well as political capital.** Many PSOs were able to quickly create collaborative funds for their members to contribute to. They also were able to mobilize political capital in the form of advocacy efforts directed at government as well as philanthropy itself.

- **Used a racial equity lens in their response to COVID-19 and encouraged their members to do the same.** “We reaffirmed our commitment to equity but in the context of rebuilding the economy and equipping workers with greater resiliency,” one leader said. Another reported that “We are more intentional in addressing anti-racism, anti-oppression and racial disparities at the core of our next strategy.”

PSOs Saw a Smaller Effect on Membership Numbers

Leaders were asked what effect, if any, did they think the pandemic and their PSO’s response to it have had on their membership numbers. The results were mixed:

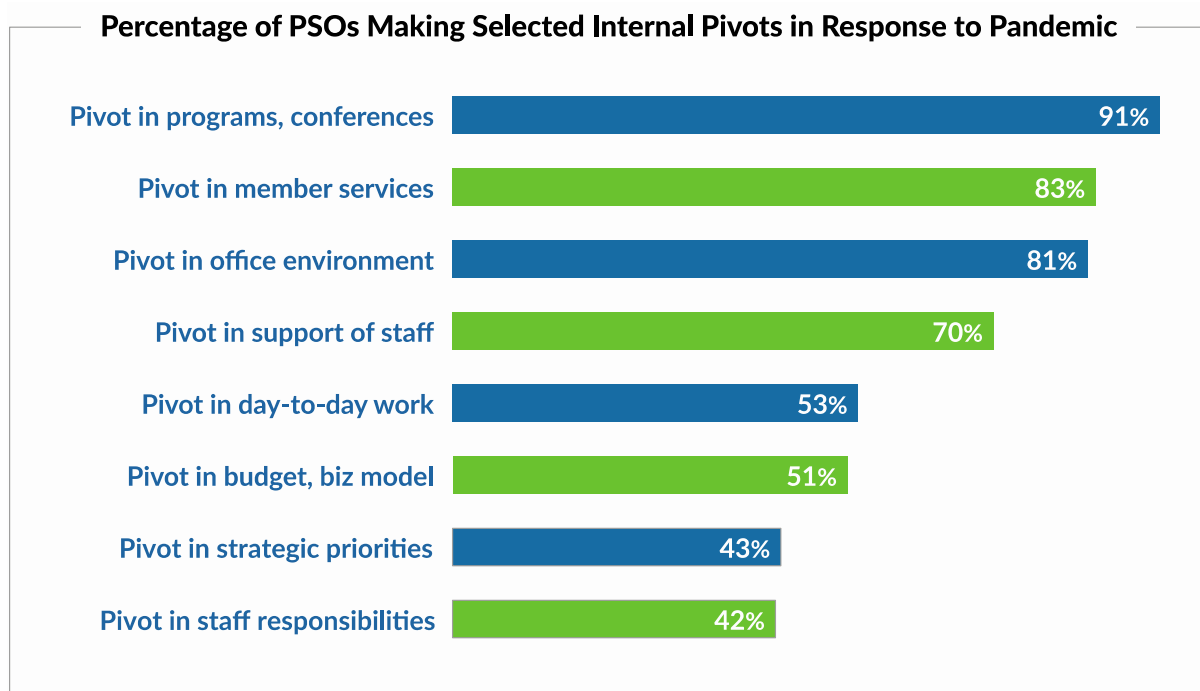
- **40%** said they experienced an increase in membership since the start of the pandemic.
- **11%** experienced a decrease in membership.
- **49%** experienced no change.

“Our paid membership increased by some of the economic volatility would decrease our membership,” one leader said.

Many PSOs provided pandemic programming access to members and non-members alike, a move that paid future dividends. “In our case, free access resulted in new revenues in membership and unsolicited grants,” a PSO leader said.

“We kept our members going, put ourselves in the center of their network and created logistical support,” another said. “For anyone who had question about why we existed, we have demonstrated our value proposition. The big question now is how do we keep member engagement and momentum up as we move from crisis to normal life.”

PSOs Made Significant Internal Pivots



In responding to the pandemic, PSOs made some substantial Internal changes:

- **92%** of PSOs changed the way they approach their conferences and programs.
- **84%** changed the way they provide services to members.
- On average, respondents reported making five of the nine pivots covered in our inquiry.

All these pivots took energy and time, but ultimately had a galvanizing effect on staff, challenging them to build new skills and work in new ways. “I think a time of crisis showed the staff that they could move fast, and be nimble, and move programs without waiting for them to be perfect,” one leader said.

“That in order for us to be relevant and for philanthropy to be relevant, we need to move like advocacy organizations, be creative and be bold.” According to another leader, the pandemic “changed our culture—from kind of slow and very planful, to rapid response, fast acting, and regular, timely and relevant content.”

Respondents were asked which pivot would have the most lasting effect on their organization. Regional PSOs were more likely than national PSOs to say that the pivot in how they provide services to members will have the most lasting effect, whereas national PSOs were more likely to say a pivot in programs and conferences will have the most lasting effect.

Going Virtual

The big pivot, of course, was the move to virtual ways of working, both inside the organization and with members. This shift included hosting virtual rather than in-person engagements and having staff work remotely from home rather than in an office. Many leaders noted that while these shifts occurred during the pandemic, it is likely that some of these changes will remain permanent. When asked to reflect on this shift to virtual, PSO leaders talked about both the benefits as well as the challenges of working electronically, but were significantly more positive than negative in their appraisal:

“As a staff with a significant rural component and lack of public transportation infrastructure, shifting to virtual programming has allowed us to work with more of our membership.”

“Delivering services virtually allows for much more content to be covered, for sub-groups to work together, and for staff of our member organizations—not just CEOs—to engage with our organization.”

“Going all virtual has been a gamechanger.”

“It’s finally possible to imagine not paying for mediocre office space in one of the most expensive rental markets in the country.”

“Serving members virtually allows for great reach as a statewide organization—reducing geographic boundaries and barriers to participation.”

“We wouldn’t have imagined it for ourselves but going virtual has been a relatively good thing for our team and for our members. We have broader reach, more participation, and we are saving in monthly expenses.”

Going virtual brought challenges, too. Some worried about “learning how to create effective peer learning without being in person.” Others wondered if not being in person hindered peer-to-peer diffusion of innovations in critical issue areas like equity. “I’m concerned about the ability to reach funders who aren’t already predisposed to our message of equity and social justice,” one PSO leader shared. “With in-person conferences, you get lots of opportunities for that. With virtual content delivery, those already with us are the ones attending. It’s a real challenge if the pandemic permanently crushes in-person gatherings.”



Business and Membership Model Changes

We asked PSO leaders, “Is your organization thinking differently about your business model or membership model as a result of the pandemic?”

- **55%** said they were thinking differently about their business model
- **22%** said they were thinking differently about their membership model

Many PSOs, as their members grappled with how to redirect funding and energies toward responding to the pandemic, decided they had to endure short-term pain. Plans to increase member dues were put on hold. Fundraising campaigns were put on the backburner. In-person events that had been revenue generators and brand-builders were suspended. Rather than charging a registration fee, virtual programming related to the pandemic was often made available for free, and to members and non-members alike.

The urgency of the pandemic shrunk the horizon in some cases and expanded it in others. Some PSO planning efforts stalled. “It’s difficult to predict behavior in a pandemic,” according to one leader. In other cases, the disruption led some to question long-held assumptions and even accelerate planning. Ideas about expanding membership categories—including expanding to nonprofits—took hold.

Opportunities to serve as intermediaries and managers of funds that emerged during the crisis were a turning point for some PSOs. These opportunities led some leaders to explore how to maintain those revenue-generating roles. “It is showing us that we can manage large funds,” says one leader, “and galvanize both institutions and individual donor support.” Mobilizing funding in quick time spans and across sectors pushed PSOs to pick up speed and expand their usual reach. New muscles were developed. Confidence rose. “I don’t think we would have thought we could move quickly and take on this work,” according to one PSO leader. “It has really excited the staff.”

PSO leaders kept their eyes focused on long-term gain. The pandemic response could lead with a loss while paving the way for member engagement and loyalty down the road. And that strategy has already borne fruit for some. “We wanted to focus on ‘being a provider’ versus another nonprofit with new fiscal needs,” according to one leader whose PSO was able to make new progress in member renewals and fund development after the pandemic crisis subsided. “It allowed us to become more of a partner during crises. So far, our members are not only renewing, they are giving us more money beyond their usual membership fees. We were tangibly there for them, so now they are honoring that presence through their membership.”

What's the Story Here?

During the focus groups, PSO leaders were asked, “What do you think philanthropy leaders should take away from how PSOs have responded to the pandemic?” In short, what story do they think was told about PSOs? Their responses can be organized into five stories: crisis response, adaptation, philanthropy collaboration, cross-sector partnership, and PSO leadership.

A Story about Crisis Response

The pandemic was a powerful and unprecedented reminder that funders naturally turn to PSOs for guidance, information and connection when crisis hits.

“The importance of infrastructure, voice, relationships, and connectivity in a crisis.”

“Disaster preparedness includes investing in relationships, human infrastructure, etc.”

“PSOs are the backbone to effective crisis response.”

“PSOs are in it for the long-term from immediate response, ongoing needs, and working to convene partners for long-term rebuilding to make the next normal better than the challenges pre-pandemic.”

“Place-based funders and place-based PSOs offer tremendous value during disaster.”

A Story about Adaptation

PSOs rose to the challenges of COVID-19, adapting quickly to an ever-changing landscape and moving funders to do the same.

“Funders changed practices and many also stepped-up funding levels. PSO support and encouragement was a big part of that.”

“Philanthropy leaders should understand that the funding landscape has changed and will not return to the old standards. Some changes that they made in their workflows should be standard and permanent.”

“That we have the capacity to pivot quickly to meet their needs.”

“The need to be adaptive to, and supportive of, change and the costs of retooling.”

“There's a lot of flexibility and agility with PSOs—an ability to share info quickly, finger on the pulse, important for info sharing and moving funding.”

“We are extremely nimble.”

“We helped the sector chart a response from: chaos, disorder, ambiguity to response to resilience to adaptation—and did so through the tumult of a pandemic, racial reckonings, climate crises across the U.S. and deep political discord, distrust and misinformation.”

“We're good at test and learn, quick adapters and have access to relationships and information across sector and geography.”

A Story about Philanthropy Collaboration

PSOs helped paved the way for new forms of collaboration within the philanthropic sector.

“Coalitions of all types are what made a huge difference.”

“Collaboration, please!”

“Continue to leverage existing networks to connect national PSOs, funders, resources through the Forum network—both post-pandemic and when the next disaster happens.”

“That PSOs are conveners and continue to blur the lines both physical and psychological throughout our network.”

“The fundamental necessity of relationships and trust to do this work well, to be in community.”

A Story about Cross-Sector Partnership

PSOs are natural conveners for bringing philanthropy together with other sectors—a role that expanded and deepened for many PSOs during the pandemic.

“Local knowledge, connections, and cross-sector partnerships established.”

“PSOs can provide a central touchpoint to other sectors, e.g., public, corporate to coordinate responses. This can be an ongoing role.”

“We have been trying to work more proactively with state government and have realized how much philanthropic influence is needed to change the way some parts of government think about the nonprofit sector—not understanding/valuing its work and impact, not resourcing it adequately, not treating it as a ‘vendor’ when its services are needed and then ignoring it.”

“When philanthropy partners, communities can prosper.”

A Story about PSO Leadership

The pandemic put a particularly bright spotlight on the important leadership role of PSOs in the sector that has always been there.

“Equity, equity, equity—we provide support to funders in considering how to update their priorities and processes to address institutional and systemic oppressions.”

“PSOs can support external and internal capacity. We were able to support large grantmaking efforts and consolidator of resources that a foundation can't do.”

“How much value PSOs brought to the sector of Philanthropy.”

“Recognize the strength and power of your PSO to convene, address critical issues, support nonprofit partners, educate policymakers about the roles and powers of philanthropy.”

“I am at a national PSO, but I serve on the board of a regional PSO, and I was so blown away by the work of that staff. I really hope more funders get it now—and will support infrastructure orgs in the ways they deserve to be supported.”

“The value of support in times of crisis and the infrastructure necessary to ensure that capacity is available when needed.”

“I have been blown away by the amazing work of the regional and national PSOs to help funders get the info they need and connect with each other. I think PSOs showed their incredible value—they have been essential.”

“We were seen as an immediate and ongoing resource at an unprecedented level.”

LOOKING FORWARD

When the cascade of precautions and lockdowns began, PSOs found themselves in a state of limited information and rapid adaptation. It was difficult if not impossible to plan far ahead or make purposeful choices. Turbulence hit, visibility was low, navigation became tricky. During this stretch, PSO leaders readily acknowledged mistakes made, challenges faced, and lessons learned. As part of our inquiry, we held focus groups with PSO leaders to explore those lessons. **What takeaways from their experience could help them succeed in a post-pandemic world?**

The discussions covered what the new landscape looks like for PSOs in the wake of the pandemic and its reverberating effects. They also focused on what PSOs can do to prepare for the next such disruption. The result was a set of ideas that could be characterized as “glad we had,” “wish we had,” and “let’s have going forward.” We’ve organized these reflections⁴ into three categories:

1. Takeaways related to **external work** with members and partners
2. Takeaways related to **internal work** in organizational management and capacity
3. Takeaways related to **United Philanthropy Forum’s ongoing work** in support of the PSO network

EXTERNAL WORK IN A POST-PANDEMIC WORLD

Member Engagement Takeaways

- **Relationships are the solvent.** Relationships dissolved the emotional buildup of both pandemic and politics. They enabled people to be human and vulnerable—while things were in upheaval. More practically, they made quick adaptation and collaborative action possible. “We had strong relationships with our members, and our members had strong relationships with each other.” “We had good distribution networks and high engagement among members, which really helped when we were trying to get time-sensitive information out to members via email or video conferencing.”
- **Create space to “just talk.”** Often the idea of “networking” conjures images of people mingling in between the sessions of an in-person session. Without that, PSOs were forced to create open spaces in the more closed virtual world, during a time when the desire for connection was at its most palpable. Allotting time on a Zoom call for people to just talk with each other about their work can feel counterintuitive and messy. But during lockdowns, it was vital. “We have been creating space for less structured conversations so members can connect in various ways outside a structured program or meeting.” “We’ve realized how much our members look to us for custom networking support,” one leader said. “We are planning to deepen our work in the networking space.”
- **Segment members.** It would have helped to approach engagement of members in terms of different segments—assets, type of work,

⁴ Note that these are not intended to be an exhaustive set of practices and steps in these areas but instead a snapshot of what was top of mind among consulted PSO leaders.

location, etc.—during and after the pandemic, according to PSO leaders. “In some cases, it would have been helpful to have had smaller networks to work with, to have better segmented our members for engagement,” one said. “I am planning to do quite a bit of segmentation to support future work.”

- **Ask members what they need.** The pandemic opened the door to new kinds of conversations with PSO members and for more leadership from them. One new-on-the-job PSO leader said, “We’re asking members more than ever, ‘How do we support your work?’ This is leading to more engagements with individual members, which is great for a new CEO.”
- **Provide members with more leadership platforms.** Three leader perspectives: “Members are hungry to help lead the work, so they are coming forward with program ideas.” “We

launched a member-led webinar series.” “We are leaning on our members to take up more leadership in our work. This started pre-pandemic, but we have to do it more intentionally with the workload and decreased staff capacity during the pandemic.”

- **Make use of cohorts and collaboratives.** “We’re launching communities of practice to better support relationship building *and* to support the application of learning, such as our racial equity cohort. We’re really good at learning programs. We are hoping to get good at hosting *doing* programs.”
- **Support member self-care.** “We’re designing more confidential conversation opportunities as members work through these challenging return-to-work moments,” one leader said. “How do we blend in mental health connections?”

Leadership Takeaways

- **Be strategic about your roles.** So many PSOs became content aggregators, resource hubs and fund coordinators during the pandemic that leaders began to worry they were duplicating efforts. In retrospect, they wondered, how could we have coordinated activities? How could we have streamlined funds? Another hazard was the sheer range of choices. Some leaders said they found it difficult to “stay in our lane” and focus only on responses that could make the biggest difference, given a barrage of needs. For example, one leader—in a point reinforced by many others—said, “It could have been beneficial to work more strategically on public-private partnerships rather than being responsive to opportunities.” Another challenge that surfaced was how to carve out time to think strategically and not get stuck in permanent crisis mode. “It felt like emergency after emergency, hitting you in your belly and your heart,” one leader reflected. “Sometimes

you want to do a good ol’ fashioned strategy retreat.”

- **Integrate racial equity with crisis response.** For many if not most PSOs, work during and after the pandemic was a Venn diagram, with one circle pandemic response and recovery and the other racial equity and a large overlap between. The racial justice reckoning during the summer of 2020 and the disproportionate impact of COVID-19 on communities of color brought racial equity to the center of PSO work. For PSOs that had been making racial equity a centerpiece of their leadership agenda before the pandemic, the inequitable burdens of the pandemic were a galvanizing proof point. “If we’re not speaking up now as a PSO that has the privilege to do so, when are we going to speak up?” one leader said. “Still, I wonder if we could have been bolder and conveyed more urgency?” Some wondered: how could we have

connected our pandemic response with our racial equity work earlier and more intentionally? “I wish we would have utilized pandemic response conversations as a more integrated component of our racial equity strategy during the early months,” one leader said.

- **Lay the groundwork for policy.** “I wish we had been better positioned on the advocacy and public policy front,” one leader said. Preparing for public policy efforts was seen as essential. Those who had principles, practices and relationships in place before the pandemic and were able to build on those seemed to experience success. Those who hadn’t done so were left more wary about policy work. “I think that our members see public-private partnerships as the Holy Grail of philanthropy,” one said. “I had a front row seat to watching efforts to work together across public and private entities that just failed. Full stop. I’ve learned from them and I’m trying to prompt some reflection across my colleagues about what happened and how we could do better. What I learned: where things went well is where there was trust and relationships. We need to

identify some guiding principles for these partnerships.”

Preparing for a Crisis

These seven Do’s and Don’ts were most frequently shared by PSO leaders:

1. Do develop a Business Continuity Plan, specifying how your organization will continue to operate during disruptions across all areas of work.
2. Don’t underestimate the amount of staff time needed to mobilize and manage collaborative funds.
3. Do plan for recruiting and onboarding new staff during remote work.
4. Don’t hesitate to work with funders to repurpose program grants to general operating support during difficult circumstances.
5. Do learn from work done by some PSOs in the Forum network on disaster response and recovery.
6. Don’t assume the next crisis will be like this one.
7. Do have a crisis communications plan in place.

Partnership Takeaways

- **Maintain strong connections with other PSOs.** This enabled efficient and speedy coordination and collaboration. “We had strong relationships with PSO partners in the field who were able to help us identify critical issues and were willing to speak with us and our members,” one leader said.
- **Get seats at different tables—philanthropy, cross-sector, government, nonprofit, community.** “Our staff had seats at several regional tables where our members gathered,” one regional PSO leader reflected. “It allowed us to get quick insights on needs and challenges for our members.” Many mentioned the benefits

of previous work and relationships—from Foundations on the Hill, the Census work, programmatic partnerships, etc.—being a critical advantage during a crisis when there’s no time to form them. “Our statewide and national network of partnerships gave us muscle memory and the ability to lead with strategic thinking and actions,” another leader said.

Programming Takeaways

- **Find the right balance between in-person and virtual.** For many PSOs, there's no going back to the pre-pandemic world in which virtual programming was the exception. Virtual options will now be on the table, and some PSOs are experimenting with hybrid programs in which some participate in-person and some virtually. "Our network is more engaged than ever," one leader said. "We're able to engage remote parts of our region. The level of inclusion has been amazing and we don't want to lose that. We're going to keep virtual programming."

"We're going to continue to offer more virtual opportunities and keep members comfortable learning this way," another leader said. A third noted, "We are looking to find the balance between online, in-person and hybrid programs."

Virtual work allows more to participate, but members still want personal connections from in-person gatherings."

- **Make virtual personal.** Because so many members now prefer virtual, which makes it easier to meet and meet more often, PSOs are working on finding ways to enable the relationship-building so crucial to cohorts and peer networks to happen on video. How to create the special experience of cohort learning and bonding virtually? Nearly every leader we spoke with was grappling with this. "We have to figure out how to pivot our cohort-based programs to a virtual world," one leader said. "So much of the trust and relationship work that is core to those programs is difficult to replicate in Zoom."

"Our network is more engaged than ever. We're able to engage remote parts of our region. The level of inclusion has been amazing and we don't want to lose that"

Planning Takeaways

- **Plan for the next crisis.** Advance planning and preparation for the next crisis was seen as a must. In some cases, having a plan in place was helpful but not sufficient. It needed to be adjusted on the fly. “We had a business continuity plan that helped us to be ready for remote work,” one leader said. “It was built on the idea that the longest we would ever be out of the office was two weeks!” Those PSOs that had been involved in disaster planning, response and recovery prior to the pandemic felt that the experience had helped them. “We had engaged in disaster planning,” one said. “Although this was different, we used the same lessons on how to bring funders together and use our platform to collate and share information.” “Place-based funders and place-based PSOs offer tremendous value during disaster,” another said.
- **Be intentional about time.** The most common challenge leaders cited: resisting the pressure to act immediately and take enough time to prepare their organization’s response. “If I had to do it all over again,” one leader said, “I would

approach it as a marathon rather than a sprint and pace our work differently in order to preserve the team’s energy and boost morale.”

At the time, it was difficult to know if the acute circumstances would take weeks, months or years to stabilize and subside. Still, leaders agreed that being intentional about time—recognizing how much time would be required for programming in a new context, giving themselves leeway to postpone annual meetings when shifting to virtual rather than trying to meet the original in-person date, etc.—would have made a difference. One retrospective question that leaders wrestled with: How could we have better differentiated when an immediate response was required from when longer-term work would be more effective? For example, one PSO spent a lot of time working with a contractor to create a tool to collect information on how members were responding. By the time they finalized and fielded it, they felt like they missed the critical window for gathering that information.

Organizational Structure Takeaways

- **Tap into diverse experiences among staff.** Having diverse skills and experiences represented among staff was mentioned by some leaders as a key ingredient and others as a missing one. “We had a diverse staff from different industries,” one leader said. “Some were more familiar with crisis communications and leveraging public resources. So, we were able to respond quickly to community and member needs.”
- **Cross-train staff.** This involves training staff to work in different roles and to do tasks outside

their normal responsibilities. “We didn’t have good cross-training across staff,” a leader said. “When we locked down, I immediately had staff cross-train each other. We are planning cross training in the future.”

- **Revisit board engagement.** With a majority of PSO members intending to add in more virtual events to their programming model in a post-COVID era, there is concern that board members will have fewer opportunities to engage with members, community partners, and staff.

Business Model Takeaways

- **Develop a Business Continuity Plan.** This guides how your organization will respond during a crisis or disruption and was seen as a must-have by several leaders. “It helped us to be ready for remote work,” one PSO leader said.
- **Build the case for support.** Many PSOs put dues increases on hold but are now recognizing the urgency of making the case for support, pointing to PSO work in pandemic response and recovery as a big part of that case, and increasing board member engagement in fund development. While PSO performance in the wake of the pandemic is widely seen as a plus in mobilizing greater financial support, there are challenges. “How do you make the case for renewals and membership dues increases in this new context when priorities might not be in your favor?”
- **Maintain a healthy reserve.** Having a reserve “allowed us to relax both personally and professionally, and to focus on the needs of our members rather than ourselves,” one leader noted.

Having a reserve “allowed us to relax both personally and professionally, and to focus on the needs of our members rather than ourselves”

PSO leaders were asked what kind of support they might need for other PSOs in the Forum network and from the Forum itself in a post-pandemic world. They made these observations and suggestions:

- **The network is working AND can do more.** That was the clear consensus among leaders who participated in the inquiry. “We will continue to connect with national PSOs, funders and resources through the Forum network,” one regional PSO leader said. “It will help us post-pandemic and when the next disaster comes.” “We are talking much more with other PSOs and doing a lot of joint programming with them. We’d like to maintain this.”
- **There is interest in expanding collaboration among PSOs.** “With fewer limitations on geographic barriers, it seems that more collaboration on programming could reduce duplication of effort,” one leader said. “How can the Forum play a role in facilitating?” According to another, we need “more collaboration and shared ways of working and amplifying work so funders see us modeling collective action, which is what we want from them.” In particular, leaders are interested in collaborating on programs. “Continued collaboration on programming” is needed, said one. “Virtual programs, limited staff capacity, and shared interest in lots of common topics all lend themselves to this.”
- **There is interest in partnerships and support on racial equity work.** “We’re interested in connecting with others who want to jointly think about evaluating racial equity in their members’ work,” one leader said. Another leader expressed interest in “opportunities to discuss our collective and independent efforts to advance equity-centered approaches to member engagement.” Interest was also expressed in mobilizing attention and information on the long-term impacts of COVID-19 on Black, Indigenous and People of Color (BIPOC) communities and inequities facing rural areas. And we heard interest in the Forum finding a “way to get all 90 partners working more aligned to advance policies that undo systemically bad structures and policies.”
- **There is interest in partnerships and support on public policy work.** “Bring PSOs together around common policy goals and priorities,” one leader said. The Forum has the opportunity to coordinate policy efforts across PSOs and “ensure all are on the same page,” according to another. And a third noted, “Federal policy has become so important and having the Forum and peers provide timely breakdowns and guidance has been very important.” Interest was also expressed in “looking at leverage opportunities with federal funding and getting new policies in place federally that make recovery and rebuilding funds more accessible to regions of the country” with less philanthropic resources.
- **There is interest in partnerships and support on engagement.** Leaders mentioned both member and partner engagement. They asked for information on: “rethinking how we think about engagement,” “examples and champions of effective funder-nonprofit engagement,” “thinking about access and equity” and “how to keep momentum and help funders not go back to the old normal.”
- **There is interest in learning about managing an organization in a post-COVID world.** Leaders asked for “creative ideas about organizational restructuring and dealing with decreased budgets,” ideas about tools and practices to make remote work effective, how to “enliven virtual gatherings,” and how to “keep up honest and transparent” organizational cultures.

THE BOARD PERSPECTIVE

What did the PSO response look like to PSO board members? We asked PSO board chairs⁵ four questions designed to invite reflection on breakthroughs and challenges, future strategy, the role of philanthropy during a crisis, and helpful board moves as a PSO responds.

We noticed a set of themes woven throughout their answers. The crisis led them to ask questions about organizational identity—who are we?—and their answers tended to lead them to a more courageous and expansive view of PSO work. Context matters, too. Responding to the pandemic required understanding a PSO's role as part of a web of interdependent relationships, within the philanthropy sector and beyond it. Several board chairs touched on a counterintuitive point: how they responded when the storm hit was less important than how well they had grown relationships and organizational capacity when the weather was fine. It might not be clear what or when the next crisis will be. But there are things that can be done to prepare for it. A final theme wasn't said as much as shown. The interviewed board chairs bring a deep commitment to, ownership of, and pride in the PSOs they govern—supportive feelings that only seemed to have intensified during the pandemic.

Board chairs were asked to respond to these questions:

1. How would you describe the way your PSO showed up during the pandemic? What were you most proud of? Any big challenges emerge?
2. How did your PSO's response influence the way you think about its future strategy and roles?
3. From your experience on the board of a PSO, what did you learn about the role of philanthropy during a crisis that surprised you? What would you want stakeholders outside the sector to know about philanthropy's response?
4. What is one move that you think is essential for a board to make to effectively guide a PSO during a time of crisis?

Their answers are on the following pages.

⁵ We interviewed 13 PSO board chairs. See the Methodology and Framework section for names and institutional affiliations.

Question 1: How would you describe the way your PSO showed up during the pandemic? What were you most proud of? Any big challenges emerge?

Board chairs were struck by how quickly and nimbly PSOs were able to pivot and navigate in a changing landscape. They praised PSO resilience, carrying on with staff transitions, shifting to working virtually, listening to members, doubling down on member connection and collaboration. One “aha” consistently mentioned was how the groundwork laid during the good times paved the way for the tough work during the crisis. They relied on relationships built and staff investments made long before the trouble hit, including the existing connections of the Forum network that provided a way for good practice to be shared and learned without skipping a beat. Board chairs were universally proud of staff leadership and member response. And they noted the challenges posed by being in reaction mode and coming up against increasing Zoom fatigue.

Praise for Pivots

“We’re lucky to have an **incredibly resilient and nimble staff**. The CEO quickly grasped the magnitude of the crisis and pivoted to ensure staff was safe. He also recognized the urgent need from the field and set up a listserv to connect our networks and share ideas and support.”

“I was very proud of the **speed and depth of this work**, which was all done in the midst of a leadership change and working remotely.”

“When the pandemic started, (our) board was launching work with a consultant to address DEI within the organization and the broader field. That **work shifted during the pandemic** and after the murder of George Floyd to focus on what it means to be an anti-racist organization.”

“For a staff that was accustomed to coordinating quarterly meetings for these groups, pivoting to every week or every other week, and still producing programming, was **an incredible amount of work**. And it wasn’t as if we cut back in other areas!”

“[Our PSO] proved its worth as an agile leader through its **ability to quickly change course** and meet the needs of our members during the pandemic. This was done with grace, with empathy, and a tolerance for risk and ambiguity. The staff exhibited confidence and leadership in offering new

formats for programming and communicating. I never once felt they were behind the eight ball.”

“Our PSO was **highly agile and adaptive**. Our team listened well and made thoughtful pivots, fast. Communication ramped up quickly to check in with members, understand their challenges and opportunities, and share what staff were seeing and hearing from others around the state. As an example of that agility in action, staff heard need for curated resources to help members sift through all the information coming at foundations, and in turn within just days of the pandemic’s onset launched a Resource Central website and a new policy-centered quick-read e-newsletter with need-to-know information.”

PSOs Were Ready

“The intense work over years to build strong relationships with individuals in our member foundations served as a critical connection. It helped to ensure that members turned to us, or responded to our outreach, as **a place to connect with peers early during the crisis**.”

“We had, in the years leading up to 2020, made significant staffing investments and technological **investments that served us beautifully** during the crisis.”

“It was a real testament to **the power of the Forum network** that our staff were able to connect with

peers who did remote learning all of the time and get up to speed very quickly on the tool and its use with groups. Well before May, the team had mastered the tech, figured out how to translate the learning and networking experience online, and they were teaching our members how to use it to host board and staff meetings. They did all of that in about four weeks.”

“I remember feeling grateful that our then CEO had **spent years building goodwill** across the nonprofit sector with her peers and that we had a seat at those tables.”

“While we could have never anticipated the challenges that the pandemic would present, **strong staff and board leadership and a clear sense of purpose** that existed before the crisis meant that we were poised to step into the leadership role that our members needed.”

Proud of

“I am most proud of how we **responded to the needs of our community**. We immediately partnered with a community foundation to raise funds from philanthropy that were regranted to organizations doing work on the ground to address the immediate impact of COVID-19 on underserved and marginalized communities.”

“I could not be prouder of how hard our CEO and the staff worked, under pressure, to deliver **the communications lifeline and shared learning that members needed** to fuel their response to the COVID, racial equity, and economic crises.”

“I’m perhaps most proud of the ways our CEO and staff showed **exceptional leadership in collaboration**, creating new and deeper opportunities for members to connect, and bringing together partners across the sector and the state in partnership, from policymakers to public health experts.”

“I was proud that we pulled together members and various **member-related exchanges and sharing**.”

“I am most proud that our community played such a pivotal role in the deployment of money at a time when humankind needed it more than ever. The swift and quick actions by the philanthropic community **allowed the membership to rise and show the various ways to distribute money** to new and different organizations immediately within the confines of their existing systems.”

“I think as board members we were most proud of the nearly immediate shift to create space for programming that allowed our membership to get real-time information on the pandemic, how it was affecting our communities and grantees, and also hear from each other how we were shifting our funding strategies and priorities. Especially in the early months, it was just nice to **see and connect with each other**—that alone was worth the price of admission!”

Challenges

“The unexpected challenge was **how much our partners turned to us and expected us to be a leader during this time**. We definitely stepped up to the challenge, but much of the work was reactionary without a lot of time to think through the long-term strategy.”

“I think the challenge came as the pandemic lagged and **momentum and enthusiasm for the programming waned a bit**. But I think the staff and leadership did a good job of ‘reading the room’ and tempering the topics and frequency of virtual programs to the members’ priorities and availability.”

“As the pandemic wears on, there is **a fatigue setting in with virtual programming** exclusively, but that is where we are.”

“The pandemic has presented significant challenges. Among them is the ability to keep our members connected without our usual ways of meeting. Through creativity and consistency, we supported our members to keep and grow their connections with others in the region. This is critical because our PSO is built on relationships.”

Question 2: How did your PSO’s response influence the way you think about its future strategy and roles?

Board chairs seemed to be thinking more boldly, expansively and courageously about the future strategy of their PSO in the wake of what was done and learned during the pandemic. The response was a natural experiment to test the viability of PSOs moving the sector forward on racial equity, exercising leadership, and adapting to unexpected twists and turns. And, at least as far as the interviewed board members were concerned, the experiment succeeded.

Racial Equity

“We were in the midst of developing our strategic framework when the pandemic began in our state. The racial and economic disparities exacerbated by COVID-19 were stark from the early weeks of the pandemic’s onset. It became even more clear through COVID-19 and the national reckoning for racial justice that philanthropy has a critical role to play in advancing equity, and **as a PSO, equity must be our imperative.**”

“The crisis and ensuing on-the-ground community engagement **elevated equity issues**, and many of our member institutions have turned to us for support as they advance their equity work on a longer-term basis.”

“In recent years, our PSO has embraced change. We adopted an equity framework and revised our guiding principles just before the pandemic hit. We were slow and methodical in adopting each of these changes. COVID, and the uprisings against racial injustice of the last year, introduced **a new sense of urgency for change**. Our PSO was called to move more quickly and to exhibit courage.”

“The pandemic reinforced **our commitment to centering racial equity in the work we do**, to step more fully into our role as a resource and support for the sector as well as a leader in organizing philanthropy as a force for positive change.”

Leadership

“I believe we can and should **have an increasing voice and take more leadership.**”

“I have been on the board for seven years and involved for longer than that. During that entire time, we have struggled with what it means to be a leader in this field, and to be honest, during much of my seven years, we were not playing a leading role. **During the past two years, that has shifted.** Not only did our members look to us to be a convener and leader, but other entities like the government turned to us as a natural partner. This shift has finally allowed us to lean into the words we have always stated. The work ahead is how do we harness what we have done over the past two years into our North Star.”

“The world is changing around us. How, when and why we gather are all shifting. We're going to have to be responsive to these trends and lead the thinking of **how best to deliver value and content in this new paradigm.**”

“It definitely has allowed us to think about **how we can use our networks and our influence to perhaps impact things beyond grantmaking**—awareness-raising, policy, partnering with local governments, etc.”

Adaptation

“The response to the pandemic was **evidence that the organization has the ability to be responsive and relevant.** This understanding will inform decisions on future strategy and our drive to not only be relevant but indispensable to our membership and the sector.”

“It reinforced my belief in the **importance of being nimble, flexible, and comfortable with some ambiguity.** To remain static is perilous in a world that is changing rapidly. Nonprofits that hold tight to business models that don't allow for flexibility and risk are surely going to be left behind.”

“I became more convinced than ever that the networks that our PSO staffs and supports play **a crucial role in helping the sector both respond to a crisis and reimagine itself.** So, our PSO has proven its value proposition. Now a question is whether we can further monetize some of those services to become even more self-sustaining.”

Question 3: From your experience on the board of a PSO, what did you learn about the role of philanthropy during a crisis that surprised you? What would you want stakeholders outside the sector to know about philanthropy's response?

Board chairs were encouraged by philanthropy's response to the pandemic. They saw philanthropy react with agility. They were struck by unprecedented speed. They saw boundaries being crossed. When the pressure was on, they observed philanthropy demonstrate the ability to reduce burdens on nonprofits, have tough conversations, streamline processes, engage in public policy, make practices equitable, and get money out the door.

Responding to the Community

“Foundations are inclined to stay narrowly within the lanes of their mission and their current strategic plan. During the time of crisis, philanthropy broke down silos, identifying a common agenda that crossed the individual goals of specific organizations and motivated collective action. Philanthropy came together to provide immediate relief and to invest in breaking down the systemic barriers to the success for individuals, communities, and businesses. **The moment created an imperative, and that imperative is not going away.**”

“**There was very little hand wringing.** It was almost instantaneous: 'how do we help?' and 'where do we prioritize?' No sector pulls together faster and with more determination in a crisis than the nonprofit sector. Also, we have incredibly smart people who don't worry about who gets the credit; the focus is on the outcome.”

“Philanthropy can sometimes be slow to move or evolve. I think **this crisis allowed us to see how nimble and responsive we can be.** I also think that as the impacts of COVID continue and will continue for a long time, it will be important for all aspects of our

community—public, private, nonprofit, corporate—to support and invest in communities and the nonprofit sector. We can't take our foot off the gas now that we're 18 months in. We have to move from crisis philanthropy to sustained growth and support philanthropy."

"It was great to see funders give beyond their normal giving during the pandemic and allow for already funded grant dollars to go towards operations."

"Philanthropy is not often known to be progressive or flexible. Because reality dictated change, we quickly adapted long-standing practices to get funds out the door to those communities most impacted. Many of us finally embraced general operating and suspended some of our long-standing due diligence and reporting requirements. **We were suddenly talking about community voice, shared power, and a reckoning with our past.** I would want stakeholders to know that at our heart, I believe we are trying to change our approach and belief about connecting with and listening to the community."

Lightening the Burden

"I was impressed by **the level of humanity in the field.** Collectively we prioritized staff safety and pretty seamlessly made the transition to remote work. Grantmaking is the core of philanthropy, and in the midst of the crisis we were making more grants than ever before. Many foundations streamlined their application processes, and a lot of resources went immediately to frontline organizations, where it was most needed."

"Leaders of philanthropic institutions recognized they needed to **lessen the burden and bring equitable practices** as a result of the wake-up moment the pandemic brought us."

I would want external stakeholders to know "that philanthropy has the capacity to be timely, efficient, impactful and to lighten the burden on grantees. I would like philanthropy to make this a permanent

feature of our work rather than going back to old practices—though I fear going back is more likely than moving forward. **Philanthropy started to share power by giving grantees more freedom,** particularly around general operating grants, and by granting more than the required 5%. Given the dire needs across the country, investing/spending more should become the norm and philanthropy has shown the capacity for more and should keep up the good work."

I would want external stakeholder to know "that we *can* be collaborative, and we *can* get money out fast with relatively few strings, when we need to. That **we can examine ourselves and our role in the power structure.** That we can have difficult conversations on such topics as race and privilege, and really learn from each other, even without being in the same room."

"Among our membership, the desire for connection and greater collaboration across organizations and **the willingness to adapt strategies and programs to meet the moment has been remarkable.**

Foundations can be agile, responsive partners to communities, governments and businesses looking to address the most pressing issues of our time."

Philanthropy started to share power by giving grantees more freedom, particularly around general operating grants, and by granting more than the required 5%. Given the dire needs across the country, investing/spending more should become the norm and philanthropy has shown the capacity for more.

Public Policy Engagement

“It was pleasantly surprising that we could do more than just make grants. **We advocated for policy change.** We had members advocating for the release of prisoners to reduce the deadliness of the virus in prisons and jails. We had members advocating for the city government to find ways to support young people who wouldn’t be able to take part in Summer Youth Employment programs. Our members were seemingly everywhere—not just getting out checks and working to release restrictions on grants. They were looking for every possible way to raise their voice about the issues that were resonating in communities and on the ground. Many of our members also provided emergency relief funding in response to the unanticipated needs of their grantees.”

“It was remarkable how quickly we were able to mobilize efforts of policy and advocacy in meaningful ways. Our PSO served as a collective voice for members in letters, calls and virtual visits with policymakers to support communities and nonprofit partners from the earliest weeks of the pandemic. Many foundations were also able to leverage years of relationship building with state and local officials to serve as a critical resource and connector to their constituents. **We recognized this would be an opportunity to build back better and used the tools of policy and advocacy to put equity at the center.** The focus of our message that members and staff brought to policymakers during this year’s Foundations on the Hill was that philanthropy is a partner in crisis and beyond.”

Question 4: What is one move that you think is essential for a board to make to effectively guide a PSO during a time of crisis?

PSO board chairs identified several moves in answering this question. They talked about trust and communication. They told stories about PSO board members “stepping up” to the challenge, individually and collectively. They spoke to the multiple roles that board members can play. They highlighted the need to embrace diverse organization types within PSO memberships. And they encouraged PSO boards to attend to the fundamentals of relationship building, strategy development and organizational capacity building during the good times.

Trust

“We recognized that early on, things were moving fast, and we would not always have time to convene the board on every decision. **We embraced trust in our leadership and staff** and employed constant and clear communication. Also, during this time, the board empowered and trusted the executive committee of the board to stand in as a proxy for the entire board to move things forward quickly.”

“Empower and trust your staff and **be willing to act courageously.**”

“**To get behind the staff 110%.** Managing a nonprofit is extremely difficult during times of crisis

let alone a pandemic. Boards need to ask staff how they are doing, check on their mental health and not only ask what support they need, but actually provide support.”

Stepping Up

“First and foremost, our board stepped up to the challenge. From my perspective, Board members did everything they could to be supportive of our staff, while at the same time trying to manage the needs of their own organizations and staff! I think our board was excellent at being great ambassadors. If asked to serve on a panel, they said yes. If asked to show up for a peer network or help us corral a working group, they said yes. And we did not let the

pandemic stop our search for a new President and CEO! We moved forward, even in a moment when we were all constrained for time. So, **maybe that essential ingredient is one of giving of oneself**—one’s time and talent and not just one’s treasure.”

“The board must be willing to embrace uncertainty, act bravely, and support staff to deal with the tremendous stress and challenging circumstances present during a time of crisis. Board members should be ambassadors for the PSO and champions for its staff, providing advice, cover, and sustained support for the courageous actions that need to be taken.”

Communication

“Constant communication with, and support for, staff.”

“Making sure that staff is **comfortable with and focused on organizational messaging.**”

Member Diversity

“Our board is comprised of a mix of various types of foundations—private, conversion, community, corporate. We need to work together, encourage nimbleness and innovation, respect the parameters of each other’s philanthropic structures, and **focus the PSO on identifying ways to incorporate all types of philanthropy** in our learnings, convenings and membership offerings.”

Don’t Wait

“Work on relationship building now—don’t wait for a crisis. When communities and foundations are faced with crisis, PSO leadership may be required to make decisions quickly, to pivot and adapt, to pause one thing and begin something else. Without trust, respect and understanding already in place, those

pivots can be pitfalls. Our board had been on a shared learning journey together to strengthen our connections and relationships with one another, and our CEO has been very intentional about building trust.”

“Invest in strategy development and organizational capacity before a crisis hits such that the PSO can step up quickly to help members deliver a high quality, coordinated response. This includes a cohesive board with strategic clarity, strong, empowered executive leadership, adequate program staff capacity, robust technological infrastructure, and adequate cash reserves. So, be ready and then lean in. PSOs are uniquely situated to do this. And then, coming out of the crisis, make sure we learn from it, e.g., ‘never let a crisis go to waste.’”

Board Roles

“Choose the right leader and then support that leader’s work by **being committed ambassadors and leveraging board member connections** and networks to strengthen the organization.”

“As board members, we bring multiple perspectives to our work—as governors, as representatives of member organizations, and as individual leaders. **Each of these identities is essential at the board table** of any membership organization.”

Conclusion

THE NEXT DOORS

What's next for PSOs in a post-pandemic world?

The concept of the “adjacent possible” might help answer that question. It’s an idea about how evolution happens, first introduced by biologist Stuart Kauffman and popularized by Steven Johnson in *Where Good Ideas Come From*. “One way to think about evolution is as a continual exploration of the adjacent possible,” Johnson writes. Evolving into the adjacent possible, he says, is like opening the door to a room that has several other doors. Once you open one door, you enter another room with still more doors. Each room presents adjacent possibilities that were not possible before.

This lens is clarifying because it helps us see change in terms of incremental building blocks. Consider United Philanthropy Forum as an example. Remember back to 2015, when the vision of bringing together national and regional PSOs into one network was just emerging. Now think about the Forum’s current state in 2022. There were multiple steps in the evolution. The Forum could not have made one giant leap from then to today. Each step led to further “adjacent possibilities”—opening doors to the next rooms out.

Leaders of PSOs are thinking about those doors for their organizations and their work together as part of the Forum network. And they’re determined to walk through them. During the inquiry for this project—scan, survey, focus groups—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. As one leader said, there shouldn’t be a return to the “old normal.”

We’re seeing PSOs open several next doors.

More Transformative, Less Transactional: One door is to a more transformative, and less transactional, relationship with members. Indeed, 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. “You can be part of the change you want to see in the sector through engagement with us,” as one leader put it.

A central focus on racial equity and accountability: There might be no better example of this kind of mobilization for change than the work of PSOs during the pandemic on racial equity. The equity door is being thrown wide open. 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. “The COVID journey and the equity journey have intersected and are bringing people to the table,” one leader said. Another leader put it this way, “COVID was spring training for the big game of the equity conversation.”

For many leaders, the racial equity conversation is ultimately an accountability conversation—not just for society but for the philanthropy sector. 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. Here's how one PSO leader framed it:

"There are questions rising up about accountability more today than I can recall. What role can the PSOs play in advancing the field here? We are all over the map, for sure, in what accountability will look like. But with a reckoning around equity and injustice and with lessons learned from COVID around, how philanthropy can do its work differently? PSOs could be leaders in the movement on this question."

The pandemic led foundations to make or accelerate some deep changes in what they fund and how they work. Expanding investments in racial equity work, trust-based philanthropy practices, partnerships with other sectors, new approaches to organizational culture—these and other shifts have swept through the sector. Leaders of PSOs are exploring how to work with members to sustain the innovation:

- "We saw so many funder behaviors change in a quick amount of time. I don't want to see us go back."
- "Our foundation partners don't want to revert to how they were operating before the pandemic. How can we help that conversation happen?"
- "Grantmakers are rooted in comfort, staying warm under their blankets. We need to stay in this uncomfortable space. What are the go-to moves to keep people in the discomfort zone?"

Keeping people in the "discomfort zone" wasn't exactly what PSOs were known for in decades past, but that is changing.

New kinds of bold PSO leadership: Another door being opened is to new kinds of bold leadership by PSOs. 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. "We've always done cross-sector work, but now there's lots of focus on weaving public sector, private sector and philanthropic dollars together," one leader said. "When philanthropy partners, communities can prosper," another said. "PSOs are the backbone to effective crisis response working with those with lived experience, genuine connections and expert knowledge."

With those 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? Several developments have turned what was once experienced as an either/or dilemma into more of a both/and balance to strike. The pandemic and the racial justice movement increased the urgency for PSOs to take a leadership role. Members are increasingly looking to their PSOs to act and provide opportunities for them to help lead that action. Indeed, as a PSO leader put it, "leadership is the member value." And PSOs are becoming uniquely adept, as another leader put it, "in our ability to create the space and trust for peer-to-peer accountability."

A renewed focus on networks: The continued nurturing of PSO networks and their peer-to-peer connections is another next door being opened. 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. "You can't build a network during a crisis," one leader said. "You have to invest in them on a sunny day."

Leaders are wrestling with how to continue strengthening their networks, especially considering the challenges and opportunities posed by virtual work. Although leaders widely appreciate how virtual meetings allow “more people to come to the table,” they also recognize that the reduced personal connections have posed challenges to relationship-building. “Networking has been lost in the shift to virtual,” one PSO leader said. “Our network continues. The informal networking that adds greater value has disappeared.” “It’s hard to build trust for collaboration through virtual meetings,” another said.

Along with a consistent emphasis on the care and feeding of their own networks, leaders in our inquiry were just as committed to sustaining the network of networks that is the Forum. “We need to bring our separate voices into a collective song,” one leader said about the importance of the Forum. “We stand stronger together than apart.”

