

Annual Report



YOUR GATEWAY
TO IMPACT

2021



**Philanthropy Roundtable pursues
a mission to foster excellence in
philanthropy, protect philanthropic
freedom and help donors
advance liberty, opportunity and
personal responsibility.**

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Letter from the President & CEO

ELISE WESTHOFF



Dear friends and supporters,

Two years ago, I arrived at Philanthropy Roundtable to implement a vision that is near and dear to me: building a vibrant American philanthropic movement that strengthens our free society.

As a former foundation leader who benefited from the Roundtable's guidance and resources and a Roundtable board member who helped craft our new strategic plan, I was enthusiastic about the opportunities that lay ahead for the Roundtable to be a convener, collaborator and engine that powers effective charitable giving to advance our shared values—liberty, opportunity and personal responsibility.

Of course, no one could have predicted the uncertain and challenging time that would follow my arrival in Washington, D.C., in 2020. To say that the last two years have been tumultuous for our country and our world would be an understatement. A global pandemic, a loss of learning for our children, a mental health crisis, economic uncertainty, social unrest and geopolitical events that erupted into a war in Ukraine, have had an enormous impact on Americans' lives and the trajectory of this great country.

In the midst of myriad challenges, charitable giving has been a silver lining. It provided swift and direct support to people and communities in need, developed reliable research that serves as the intellectual framework for leaders to determine effective policy solutions and encouraged people to realize their full potential. Specifically, our community of donors has been a source of inspiration, fueling organizations that uplift communities and empower individuals from all walks of life.



As Americans have grappled with complex issues that deserve careful thought, open and honest discussion and tailored solutions, the Roundtable has been a strong voice for identifying the most effective ways to help those in need. We have been a bold advocate for the importance of civil society during crises, and in normal times, limiting government to its proper role.

Although charitable giving has continued to increase year over year, we still face attacks on philanthropic freedom, including efforts to force donors to give to certain causes or on arbitrary timelines and a push to expose and shame donors based on the causes they support. The Roundtable has been a fierce defender of the right of all donors to give how, when and where they choose—because we know this sparks more generosity and benefits those who are struggling.

It has been an honor to lead the Roundtable and represent our community of donors during this time. Our network of compassionate, committed and effective donors promote America's founding principles, create pathways to opportunity and strengthen our communities every day. We firmly believe that our values improve lives, and that private, voluntary action leads to better outcomes than top-down, one-size-fits-all government solutions. The spirit of generosity that shines from this community is making a difference in so many places around the country. Thank you for the important work you do to strengthen our country every day. We are honored to build this movement with you.

Sincerely,

A handwritten signature in black ink that reads "Elise Wertheff". The signature is written in a cursive, flowing style.

Champions of Philanthropic Freedom

Philanthropic freedom is essential to improving lives and strengthening our communities. When donors are free to give to the communities and causes they care about most, they give more effectively—and more generously.

Philanthropy Roundtable seeks to preserve this bedrock of American giving by advancing philanthropic freedom in all 50 states and at the federal level. We do that by securing legislative wins, attracting new donors and effective storytelling.



Fighting the King-Grassley Bill

In 2021, bipartisan legislation was introduced in the U.S. Senate that would upend charitable giving in America. The misleadingly named “Accelerating Charitable Efforts” (ACE) Act would reduce dollars available to help those in need by punishing private foundations and donors who use DAFs and by forcing disclosure of donors’ identities.

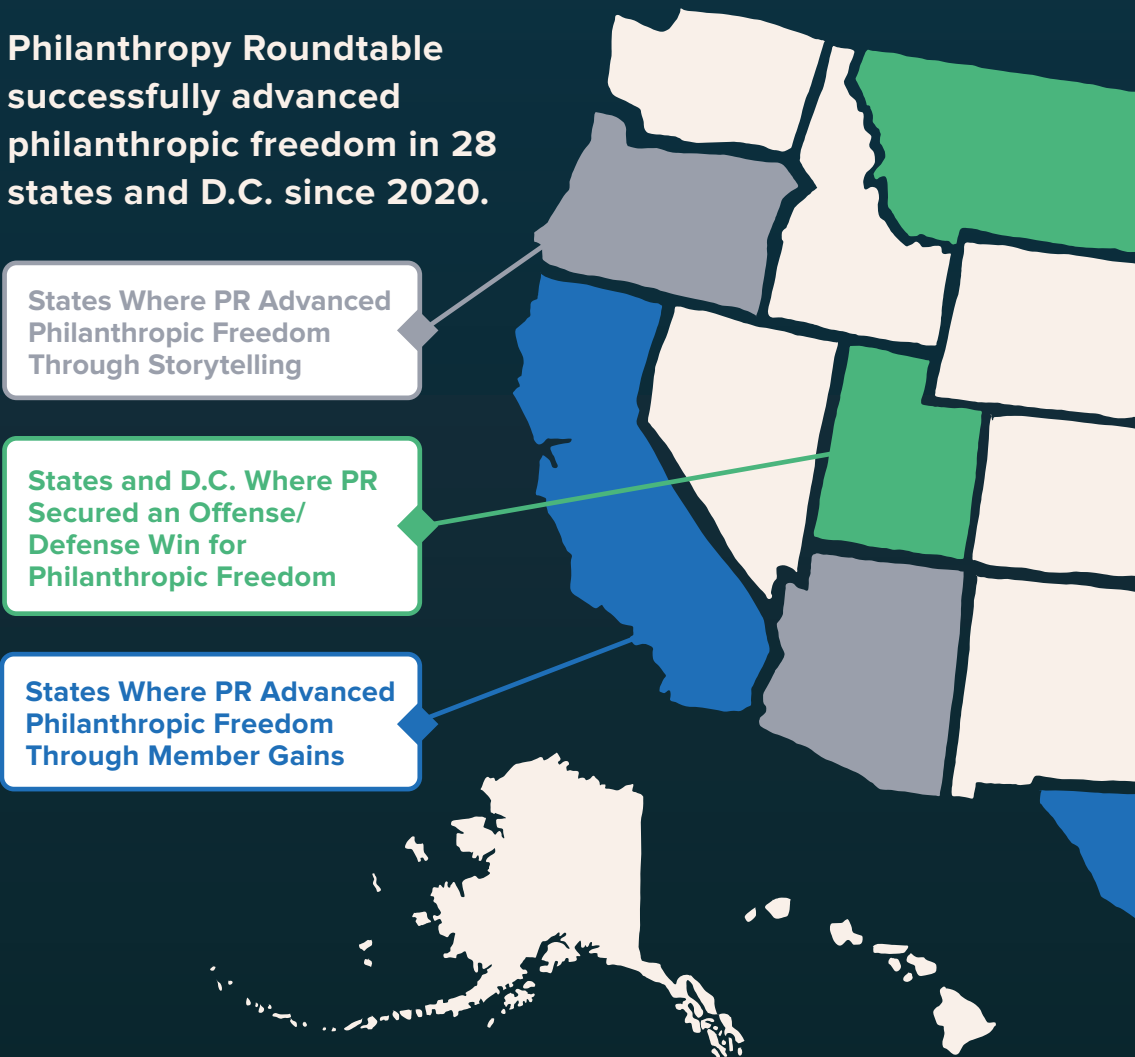
Companion legislation was introduced in the House of Representatives in 2022. However, thanks to Philanthropy Roundtable’s multipronged offensive campaign against this legislation, momentum has stalled. Neither bill has seen new cosponsors or movement forward. In fact, in a rare bipartisan effort, a dozen members of the House Ways and Means Committee wrote a letter to their colleagues cautioning against this type of legislation. However, we know advocates for punitive attacks on giving vehicles are not going away, and the Roundtable will continue to protect philanthropic freedom in 2022 and the next Congress.



Advancing Philanthropic Freedom

In 2021, the Roundtable exceeded its goal by achieving 16 policy wins for philanthropic freedom across the country. Our three top priorities are donor privacy, donor-advised funds and charitable sector regulation.

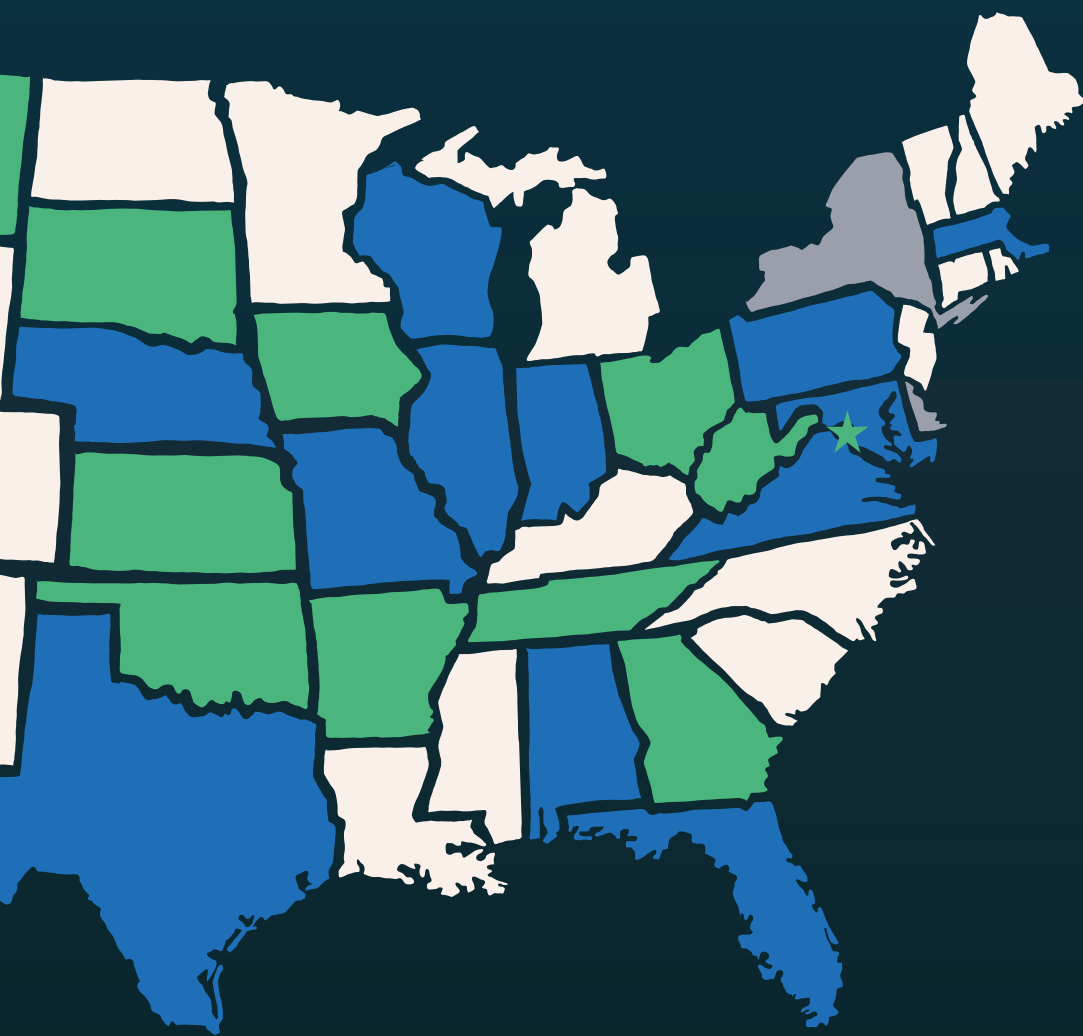
Philanthropy Roundtable successfully advanced philanthropic freedom in 28 states and D.C. since 2020.



DONOR PRIVACY: The right to give and associate anonymously is a long-standing tradition and protected under the Constitution. All Americans benefit from the vibrant and diverse charitable culture that donor privacy makes possible.

DONOR-ADVISED FUNDS: These popular and effective giving vehicles allow all givers to support a wide variety of charitable causes with little overhead and low required minimums. They provide flexibility for Americans to respond quickly to crises and to give strategically over the long-term.

CHARITABLE SECTOR REGULATION: When based on evidence of systemic problems, charitable regulations are important. However, restrictions on the sector must be limited to strategic oversight. Arbitrary rules and unnecessary mandates harm those who rely on charity the most by reducing overall giving and diverting resources away from helping those in need.



Values-Based Giving

Philanthropy Roundtable aims to create a vibrant American philanthropic movement because we believe philanthropists who invest in efforts and organizations that advance liberty, opportunity and personal responsibility can best help struggling people succeed and communities thrive. We call this philanthropic approach **Values-Based Giving**.

In 2021, the Roundtable influenced \$14 million of philanthropic giving to organizations across the country that align with our core values. We did that by building one-to-one advisory relationships with our donors, producing effective content, convening like-minded donors and advancing important conversations about promoting liberty, opportunity and personal responsibility in the charitable sector.

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Our one-to-one advisory service positions the Roundtable to provide strategically aligned investment recommendations to individual donors and foundations. In the past year, the Roundtable hired a programmatic team with national grantmaking experience and strong due diligence expertise.

Through our events and donor gatherings, we have also put a spotlight on particularly effective values-aligned organizations—helping guide the strategic investments of donors and multiply the impact of the most effective organizations.

Three Pillars of Values-Based Giving

Our values of liberty, opportunity and personal responsibility improve lives and help fulfill the promise of America. With those values always in mind, we organize our work and advise philanthropic investments around three areas:

AMERICA'S FOUNDING PRINCIPLES:

Our nation's founders created a system that protects the rights of the individual and advances liberty, opportunity and personal responsibility. The Roundtable offers strategic advising and opportunities to collaborate with influential peers that help our donor community uphold this system and defend these principles of our free society. Our focus areas include: Civics Education, Veterans, Defending Founding Principles and Foreign Policy.

PATHWAYS TO OPPORTUNITY:

With hard work, all Americans should be free to fulfill their potential and gain economic security. To realize this promise, the Roundtable fosters meaningful relationships and offers strategic advising for donors who are interested in supporting organizations that eliminate barriers to upward mobility, expand opportunity and reward hard work and perseverance. Our focus areas include: K-12 Education, Higher Education and Workforce Development.

STRONG COMMUNITIES:

The American spirit has always been generous with neighbor helping neighbor to uplift entire communities. This is the lifeblood of American civil society. Hence the Roundtable convenes, supports and advises philanthropists and organizations working on how to effectively strengthen their communities. These efforts channel generosity back into local civil society. Our focus areas include: Poverty Alleviation, Health & Mental Health and Faith & Family Institutions.



Roundtable Spotlight:

BETTER TOGETHER

Megan Rose founded Better Families in 2015 with a simple aim: to reduce the number of children entering America's foster care system. She'd spent a decade working in the Florida child welfare system, and she saw how badly families needed help. Working with the Roundtable, she quickly pivoted from a state-funded approach to a model that is 100% privately funded—and that mobilizes a network of churches and volunteers to help families in crisis.

Today, Better Together has supported 1,200 families and kept 2,500 children out of the foster care system. Among these families served, 98% have no further involvement with the foster care system—a family reunification rate that massively outperforms that of the government agencies. In addition to its Better Families program (which connects families in crisis to volunteer host families and mentors), its Better Jobs program targets a root of child neglect and family separation: Unemployment. By connecting job seekers with church-based family job fairs, the program has helped 2,400 job seekers receive job offers.

Learn more: bettertogetherus.org.

BIG IDEAS IN ACTION

Megan Rose gave a “Big Idea” talk with attendees at the Roundtable’s Annual Meeting entitled “Helping People Find Meaningful Employment in Difficult Times.” She shared the strategies Better Together uses to help strengthen communities from within. The Roundtable community is proud to work with such values-aligned organizations to help families in need.



Philanthropic Services: Protecting Your Donor Intent

Private philanthropy is an essential element of American freedom, and central to our greatness as a nation. But philanthropy can only flourish when donor intent is protected and honored: It depends on keeping the trust of voluntary donors, both during and after their lifetimes. At present, philanthropy is under attack from various quarters, with matters of donor intent questioned or poorly understood.

In response, Philanthropy Roundtable seeks to inform and guide donors in every way possible—to help you better understand the importance of donor intent and the many ways you can protect it in your own decisions about why, when, how and where to make charitable gifts. These resources include:

- ◆ Our “Protecting Your Legacy” guidebook
- ◆ The Roundtable’s online Donor Intent Hub
- ◆ Education and individual consultation to help you identify and protect your principles and priorities





THERE ARE MANY QUESTIONS A PRUDENT PHILANTHROPIST MUST TACKLE:

- ◆ Where and in what way will I focus my charitable giving?
- ◆ How can I structure and staff my charitable giving to make it optimally effective?
- ◆ On what timeline am I giving?
- ◆ What is my mission?

You don't need to handle
these questions on your own.

Learn more at philanthropyroundtable.org/donor-intent.

Get Involved in Our Donor Community




Philanthropy Roundtable is a growing network of like-minded business leaders and philanthropists who give at least \$100,000 annually toward charitable causes and support the Roundtable at the \$1,000 level or higher. Through our programs and philanthropic services teams, the Roundtable serves as an entrepreneurial and trusted partner to help our donors give with clear intent, unmatched impact and unfettered philanthropic freedom.

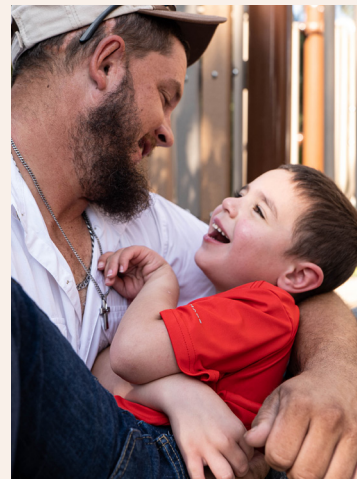
Opportunities for our donor community include:

- ◆ Strategic consulting and due diligence
- ◆ World-class retreats with other leading philanthropists
- ◆ Philanthropic working groups
- ◆ Networking opportunities with an exclusive donor community
- ◆ Strategic engagement in Roundtable advocacy efforts
- ◆ Monthly briefings offering timely and topical insights
- ◆ Inspiring stories about how philanthropy improves lives every day

Through opportunities to convene with like-minded influential peers and thought leaders, supporters of Philanthropy Roundtable gain access to a cohort of trusted advisors who can help them pursue their philanthropic goals.



To learn more about the Roundtable, please visit us online at philanthropyroundtable.org or contact **Windle Jarvis**, senior vice president of development at wjarvis@philanthropyroundtable.org.



Celebrating True Diversity

True Diversity is an equality-based initiative that promotes a thoughtful and holistic approach to embracing diversity that values each individual and allows charitable organizations the freedom and flexibility they need to pursue the best ideas and strategies available in order to advance their missions.

Rather than focusing on policies and mandates that emphasize superficial box-checking or quotas, True Diversity celebrates all of the rich identities and characteristics that make each person unique and special. It provides a framework for charitable organizations that embraces the diverse backgrounds, talents, perspectives and experiences they need to achieve their goals and help those in need.

To learn more about Philanthropy Roundtable's True Diversity initiative, visit: truediversity.org.



Five Principles of True Diversity

◆ **VALUE EACH INDIVIDUAL**

Each person is a unique individual worthy of dignity and respect. It is only by taking the time to know and understand them, their challenges and their circumstances, rather than simply making assumptions based on how they look, that we can best support them.

◆ **ADVANCE THE MISSION**

Excellent results are best achieved by bringing together people with diverse skill sets, backgrounds and perspectives to further a common mission. Each organization is in the best position to know what types of diversity in leadership and staffing will best support its mission—and thus strengthen the communities it serves.

◆ **SEEK DIVERSE PERSPECTIVES**

Good ideas can come from anywhere, and there are many ways to address social challenges. Bringing together people with diverse views is the key to encouraging a robust competition of ideas, experimentation with different approaches and ultimately better answers and outcomes.

◆ **EMBRACE CONVERSATION**

Discussion and debate open the door to progress. Direct, honest and respectful conversation may take courage, but it is the antidote to division, resentment and stagnation.

◆ **CULTIVATE EMPOWERMENT**

The best way to uplift individuals and strengthen communities is to foster the sense of agency that only comes when everyone is empowered to reach their full potential.

The Roundtable's 2021 Annual Meeting

Philanthropic leaders from around the country converged on The Broadmoor in Colorado Springs for a multi-day Annual Meeting in October 2021. More than 200 Roundtable donors attended this flagship gathering, where they heard from speakers such as former U.S. Secretary of Education Betsy DeVos, Governor of South Dakota Kristi Noem and author and Roundtable Board Member Vivek Ramaswamy.

The Annual Meeting featured informative sessions on topics such as donor intent, depolarization, the politicization of philanthropy, civics in K-12 education, impact investing in health care and many others.



Philanthropy Roundtable upholds and advances the principles of donor privacy and philanthropic freedom. This year's annual forum provided a professional refuge where participants discussed freely and respectfully different charitable perspectives without concern for condemnation. We need to hold up what Philanthropy Roundtable promotes—the freedom to learn and engage in civil discussion while assuming the best in people. We are all trying to make our communities better places to live and work. This is how the Roundtable has been helpful this year.

—Mark Pritchett

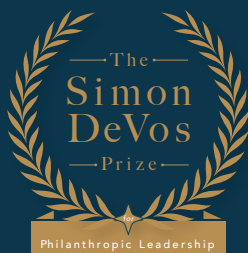
PRESIDENT OF GULF COAST COMMUNITY FOUNDATION



Awards and Honors

The Roundtable honored South Dakota Gov. Kristi Noem with the inaugural Philanthropic Freedom Award for her efforts to protect donor privacy and the ability of all Americans to give to the groups and causes they believe in. At a time when states such as California have sought to destroy donor privacy, Noem personally sponsored legislation that would protect charitable organizations from harmful mandates, and signed into law a bill protecting donor privacy for all South Dakotans. During her keynote conversation, Noem spoke about the importance of donor privacy to our country's free and vibrant philanthropic culture.





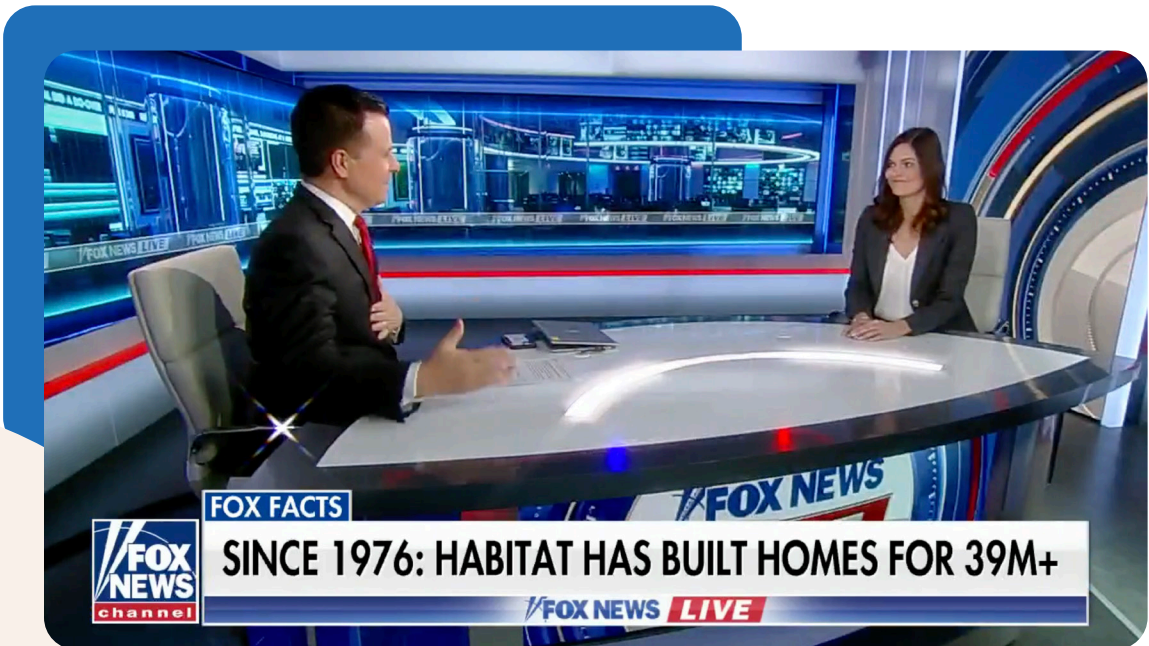
The Inaugural Simon-DeVos Prize for Philanthropic Leadership

K-12 education supporter and school choice champion Bill Oberndorf received the first ever Simon-DeVos Prize for Philanthropic Leadership. This Prize recognizes living philanthropists whose exceptional leadership in charitable giving demonstrates the power of philanthropy to promote positive change. It comes with a \$200,000 award payable to any named charity.

For decades, Oberndorf has been an ardent supporter of education reform and providing all children with access to a good, quality education. The American Federation for Children (AFC), which he co-founded, empowers lower-income families with the freedom to choose the best K-12 education for their children. He is also deeply committed to improving his local community, and recently made a \$25 million donation to Cleveland's University School, where he was educated.

In the Media

Philanthropy Roundtable raised its profile in 2021 by pursuing a new strategic focus on standing up for the organization's beliefs and values, especially through media appearances and public speaking engagements. This bolder voice came with a new look as well—an organizational rebrand and website redesign—that coincided with the Roundtable's 30th anniversary celebration. The Roundtable has become an undisputed leader on key philanthropic issues such as the importance of donor privacy, the unintended consequences of charitable giving mandates and restrictions and the threats to philanthropic freedom and culture.



Elise Westhoff discusses the state of American philanthropy and threats to philanthropic freedom on Fox News.

By the Numbers

75

Blog posts about philanthropic freedom published by the Roundtable in 2021. These posts highlighted the value of donor-advised funds, the importance of donor privacy and the pitfalls of increased sector regulation that would restrict charitable giving.

35

Op-eds and letters to the editor the Roundtable published in 2021, in venues such as The Wall Street Journal, USA Today, The Hill, Fox News and more.

16,000+

New social media followers who became a part of our online community interested in promoting and defending philanthropic freedom, free market principles and our values of liberty, opportunity and personal responsibility.

400

Publications around the country that covered the Roundtable's work opposing the King-Grassley "Accelerating Charitable Efforts" bill, including The Washington Post, The Chronicle of Philanthropy, Bloomberg News, Politico, The Hill and the senators' hometown newspapers in Maine and Iowa.

1,600+

Mentions of the Roundtable's work in philanthropic sector and mainstream media, including high-value coverage in The New York Times, The Wall Street Journal, Associated Press, The Washington Post, The Economist, Los Angeles Times and more.

1.85+ MILLION

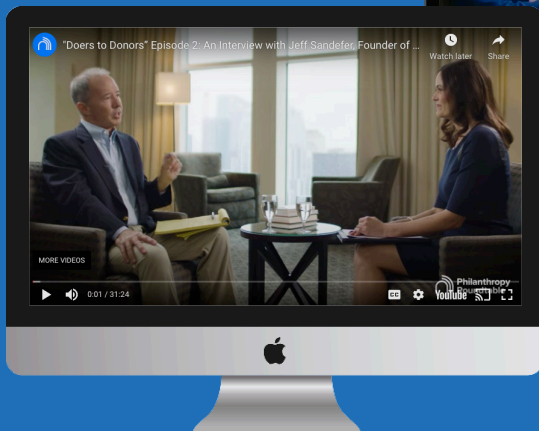
Video views of the Roundtable's work and events that advocated for philanthropic freedom, promoted our True Diversity initiative, and highlighted how private philanthropy and our values improve lives.

DOERS TO DONORS

Innovators and their philanthropy

Meet the innovators and self-made entrepreneurs who are strengthening communities and improving lives through meaningful philanthropy. In a new interview series, “Doers to Donors,” Roundtable President and CEO Elise Westhoff sits down with a philanthropist to discuss their journey, their passion for charitable giving and the advice they have for those wanting to make a difference. Their stories—from the challenges and opportunities of building a business to unique approaches to giving—inspire us all to consider how we can make a bigger impact in our own communities.

In the first two episodes of “Doers to Donors,” Westhoff spoke with Bernie Marcus, co-founder of The Home Depot (right), and Jeff Sandefer of Sandefer Capital Partners (below).



Learn more and watch our most recent episodes at doerstodonors.com.

**DON'T
MISS AN
EPISODE!**

2021 Financials

In 2021, Philanthropy Roundtable raised \$9.8 million in contributed revenue. Our overall 2021 income, including investments and other income (such as registration fees), was \$10.9 million. This surpassed our revenue from 2020 and was in keeping with the goals we have set in our strategic plan.

OPERATING REVENUE \$10.9M



OPERATING EXPENSES \$10.4M



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Anna Wood

EXECUTIVE ASSISTANT
AND PROJECT
COORDINATOR

From the Desk of the Chairman

RICHARD W. GRABER



Dear friends,

There's a deep sense of unease about the state of our union and the direction our country is headed in. The apprehension cuts across demographics including age, geography, socioeconomic status and political affiliation. Much of the reason for this stems from a lack of trust in major American institutions, from government and tech to media and education.

The philanthropic sector is not immune to declining trust from Americans, despite their inherently generous nature. It's true that charitable giving continues to be a bright spot, with half a trillion dollars going to charity in 2020, a record year for giving. It is also true that charitable giving has become highly politicized, resulting in new attacks on philanthropic freedom, donor privacy and donor intent.

Philanthropy Roundtable in 2021 was uniquely positioned to take on the headwinds facing our sector. In the past year alone, the Roundtable community had several major successes:

- ◆ Stopped a U.S. Senate bill that would suppress charitable giving and cause untold harm to people in need (see: "Fighting the King-Grassley Bill," p. 7).
- ◆ Supported a values-aligned organization in Florida to keep hundreds of families together—and their children out of the foster care system (see: "Spotlight: Better Together," p. 12).
- ◆ Launched a campaign to celebrate True Diversity, a much-needed positive framework to help charitable organizations leverage the diverse backgrounds, talents, experiences and other characteristics of those engaged with their work in order to achieve their missions and uplift communities in need (see: "Celebrating True Diversity," p. 18).

We won't stop there. Thanks to the leadership of Elise Westhoff and the commitment of donors like you, the Roundtable has become a leading champion of philanthropic freedom. Our work is fostering America's vibrant culture of giving, which is a unique and essential element of thriving communities.

Thank you for your support, and we look forward to engaging with you in the months and years ahead. Together, we can ensure that philanthropy plays a critical role in restoring trust in the institutions our country needs to remain a beacon of hope and freedom.

A handwritten signature in black ink that reads "Richard W. Graber". The signature is fluid and cursive, with a long horizontal stroke at the end.

About Philanthropy Roundtable

Philanthropy Roundtable is a community of donors who are committed to advancing our shared values of liberty, opportunity and personal responsibility through effective charitable giving. Together, we are building a vibrant American philanthropic movement that strengthens our free society.

America's tradition of private, voluntary association and generosity is without equal in the world. Giving to those in need remains a critical piece of our society's foundation, which allows us to build strong, healthy communities. To protect, preserve and perpetuate this tradition of charitable giving, the Roundtable defends the freedom of all Americans to support the causes they believe in that align with their values and passions.

For the Roundtable community, our team provides strategic consulting and due diligence on potential investments, opportunities to network with influential peers and thought leaders at world-class events, timely insights and intelligence related to public policy that would affect philanthropic freedom and advocacy that highlights how our values improves lives. Our trusted advisors help our donors connect with high-impact organizations consistent with their values in three primary areas:

AMERICA'S FOUNDING PRINCIPLES

The best way philanthropy can help safeguard the future of our democracy is by supporting organizations that promote and defend the American ideals that protect the rights and freedoms of all Americans.

PATHWAYS TO OPPORTUNITY

Every person should be free to reach their full, unique potential, and charitable giving can help by eliminating barriers to upward mobility, expanding opportunity and rewarding hard work and perseverance.

STRONG COMMUNITIES

The American spirit has always been generous with neighbor helping neighbor to uplift entire communities. Today, philanthropy plays a critical role in strengthening local civil society, bolstering direct social services and supporting individuals and families.

This unique mix of services acts as a powerful accelerant to our donors' generosity, providing the tools and resources that will help them make a lasting impact.





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philanthropyroundtable.org