

**Indiana Philanthropy Alliance**  
**Policy to Guide Action on Legislative/Public Policy Activity**

(Approved 12-9-11, replaces IPA Public Policy Principles document adopted 5-16-08)

**Background and Guiding Principles**

Indiana Philanthropy Alliance strives to be the premier resource for networking and education, information and knowledge, and leadership on behalf of organized philanthropy in Indiana. As a nonprofit membership association of grantmakers, IPA advances philanthropy by educating its members about public policy issues that can affect the nonprofit sector, by educating public officials about the role of foundations as stewards of resources for the public good to strengthen and improve the health and vitality of communities, and by advocating for public policies that promote philanthropy and the sector as a whole.

IPA's work in public policy is guided by these basic principles:

***Education of policymakers about the nature and importance of the nonprofit and philanthropic sectors.***

Indiana Philanthropy Alliance will build an informed and supportive community of policy makers through regular dialogue, education, information and advocacy, and will work with others in the nonprofit and philanthropic sector to advance this goal.

***Effective management and governance of foundations and corporate giving programs.***

Indiana Philanthropy Alliance supports public policies that promote effective management of charitable resources and supports values of transparency and ethical conduct, responsible philanthropy and corporate giving, and reasonable access to information. Indiana Philanthropy Alliance encourages voluntary efforts of self-regulation within the sector and supports appropriate external enforcement agencies for nonprofit compliance and oversight.

***Necessity of an advocacy role for the nonprofit community.***

Advocacy, within certain constraints, is legal for nonprofit organizations and conducive to an informed, healthy and strong democratic society. Indiana Philanthropy Alliance supports the advocacy rights of nonprofits and believes that nonprofits can and should participate in public policy dialogue that affects their organizations, communities and the people they serve. Indiana Philanthropy Alliance supports public policy efforts that safeguard and enhance these advocacy rights.

***Supportive tax policy for private foundations and public charities.***

Indiana Philanthropy Alliance supports tax policy that encourages the growth, maintenance and vitality of private foundations and public charities.

***Preservation of charitable deductions and strengthened tax policy supports for nonprofit organizations.***

Indiana Philanthropy Alliance supports the preservation of charitable deductions as an important tool to encourage taxpayer contributions to nonprofit organizations. Respecting

donors' choices, Indiana Philanthropy Alliance supports tax policies that broaden the incentive for all donors to give to charities of their choice without influence, restriction or inequitable treatment.

### **Process for Developing Positions and Taking Action**

The Public Policy Committee of the IPA Board is charged with providing strategic direction and input to staff on public policy issues that may affect the philanthropic and nonprofit sector. IPA staff has responsibility for monitoring and identifying public issues and policies that affect philanthropy. Staff may rely on IPA members, partner organizations, and/or public offices for information and input on issues. Under the direction of the Public Policy Committee, staff will draft an annual *Public Policy Agenda* that identifies the areas of national and state public policy that IPA may choose to develop a specific position. The IPA Board of Directors will annually review and vote on the *Public Policy Agenda*.

IPA's Public Policy Committee and the Board will be guided by examining whether:

- 1) The issue strengthens the nonprofit sector or grows philanthropic giving
- 2) The relevance of the issue to IPA and its members' ability to conduct their philanthropy effectively
- 3) The significance of the issue's impact on the community of grantmakers and/or grantseekers and being aware of the differences between members or member types and the potential divisiveness of the issue within the membership, and
- 4) The current position or role of other national and regional associations and coalitions is known vis-a'-vis the issue.

In reviewing these criteria, IPA may choose to remain silent and not pursue any of the possible strategies of involvement described below.

If a public policy arises that warrants consideration for action but falls outside of the scope of the annual *Public Policy Agenda*, staff will bring the issue to the Public Policy Committee for their direction. Recommended action will then be brought to the IPA Board (or to the IPA Executive Committee if action is time-sensitive) for final approval.

In support or opposition to a policy issue, IPA may engage in a number of strategies, not limited to: 1.) informing members about the legislation and seeking input when relevant, 2.) signing a petition or joining a coalition, 3.) contacting elected officials about the issue and position of IPA (email, letter, meeting), 4.) disseminating or conducting original research, 4.) contacting the media (e.g. letter to the editor), 5.) offering public testimony, or 6.) asking members to engage in self-defense advocacy and lobbying.

In all instances staff will inform IPA members, through any appropriate communication medium, of the position and/or action that has been taken.