



Engaging Government & Philanthropy in Florida: A Report on FPN's May 2009 Roundtables

June 29, 2009

On May 12-15, 2009, Florida Philanthropic Network held grantmaker roundtables in four regions of the state, in partnership with four regional grantmaker groups, to discuss how to continue strengthening the engagement and partnership between philanthropy and state government in Florida. The roundtables continued a conversation which began at FPN's Statewide Summit on Philanthropy in January 2009, on how philanthropy in Florida can better engage with state government officials and other influential Floridians. The roundtables were facilitated by Mark Sedway, director of the Philanthropy Awareness Initiative, who facilitated a discussion on this issue at FPN's Summit. Sedway's summary of the roundtables begins on page 3 of this report.

Action Steps

As a result of the roundtable discussions, FPN has mapped out several key strategies for moving forward in its efforts to strengthen philanthropy-government partnerships and engagement in Florida:

1. **Engage Florida philanthropy and government on projects to benefit Florida communities.** FPN will work on an ongoing basis to identify opportunities to play a role in bringing together foundations with government and other sectors to explore how they might work collaboratively on discrete projects to address community issues and needs.

FPN has already begun new work in this area following the conclusion of the roundtables. For example, FPN is now working with the Florida Attorney General's Office to engage foundation leaders with government, nonprofit and community representations on possible cross-sector collaboration on effective gang prevention and intervention strategies in Hillsborough County. Florida Attorney General Bill McCollum reached out to FPN for help as a direct result of his participation in FPN's Statewide Summit on Philanthropy in January 2009. FPN is also in initial discussions with the Florida Department of Education to explore ways to better engage foundation and government leaders in the state around education issues.

2. **Increase philanthropy's representation on Florida state government boards and commissions.** FPN will work to position itself as a key broker between state government and philanthropy to help place foundation representatives, and in a few cases FPN staff representatives, on state government boards and commissions, as appropriate.

FPN has already begun new work in this area following the conclusion of the roundtables. For example, in June 2009, FPN President Katie Ensign was appointed to the Florida Department of Children and Families' Advisory Committee on Economic Security, which advises the Department on its provision of safety-net services to Florida citizens. This appointment came about as a direct result of FPN's grantmaker roundtables in May 2009.

3. **Educate State Government on Foundations and Philanthropy.** FPN will explore different strategies for improving an understanding of the role and impact of foundations and philanthropy among state legislators and government officials, such as through an annual "Philanthropy University" and/or other means.

FPN has begun work in this area, by engaging in initial conversations with state government leaders about the possibility of sponsoring or co-sponsoring a Philanthropy University education session in Tallahassee.

4. **Develop a Strategy for Long-Term Philanthropy-Government Engagement in Florida.** Between 2009 and 2011, FPN will work to develop a strategy for how to create the best possible structure for facilitating longer-term, ongoing engagement between state government and philanthropy in Florida. This will include a further exploration of the two models discussed at the regional foundations—the Office of Foundation Liaison and the Commission on Philanthropy—to determine how they might be adapted effectively in Florida, as well as other possible ideas and models. FPN will convene a task force or committee to engage in this work, with the goal of having a plan finalized by the time the new Florida governor takes office in 2011.

For more information on these efforts, please contact FPN Vice President David Biemesderfer at 407-478-6263 or dbiemesderfer@fpnetwork.org.



Report on Florida Regional Roundtables

During the week of May 11, 2009, Florida Philanthropic Network held regional roundtables on engaging government and philanthropy in Florida. Roundtables were held in West Palm Beach (May 12), co-sponsored with the Donors Forum of South Florida; Tampa (May 13), co-sponsored with the Funders Forum of Tampa Bay; Orlando (May 14), co-sponsored with the Donors Forum of Central Florida; and Jacksonville (May 15), co-sponsored with the Donors Forum of Northeast Florida. More than 70 foundation board and staff members participated. The roundtables were convened as a follow-up to FPN's Statewide Summit on Philanthropy in January 2009. At that Summit, state government officials who participated and FPN members alike said they were committed to improving relationships and partnerships between Florida's state government and philanthropic sector.

FPN convened the four roundtables as a next step. The conversations focused on a key opportunity: ***What can Florida foundations, and FPN on their behalf, do now to improve engagement with state government officials and departments?***

This question rests on two core assumptions:

1. The assumption that the iron is hot for efforts to improve philanthropy-government engagement in the state. Three top state officials who participated in the FPN summit—Bill McCollum, Alex Sink and George Sheldon—expressed interest in such efforts and specifically asked for proposals. Meanwhile, the economic downturn has upped the urgency, as has increasing media and legislative scrutiny of foundations. Indeed, research by the Philanthropy Awareness Initiative suggests that foundations nationwide face an awareness deficit among influential Americans that, when combined with legislative scrutiny, can create a perfect political storm for the field. Finally, as indicated by the statewide summit and other developments, Florida foundations are bringing not only an increased interest in partnering but an increased collective capacity to do so, as evidenced in part by participation in the summit and the growth of FPN. All these developments created a sense of urgency and opportunity.

2. The assumption that the regional discussions and any resulting initiatives should squarely focus on work with Florida's executive branch, including the Governor and state agencies, to increase the quantity and quality of public-private partnerships. Influencing legislation to maximize the flexibility and autonomy of Florida foundations, while obviously an important need, was not the focus of the discussions.

We organized the discussions around three overarching questions (and took them up in this order):

1. Why do we want improved philanthropy-government engagement in Florida?
2. What's missing now from that engagement?
3. How can we improve it?

Summaries of the answers to each of these questions are presented for each roundtable at the end of this memo (see page 7).

Big Themes

Seven cross-cutting themes rose to the surface at the four roundtables:

1. **Move forward.** There is a strong and nearly universal desire among participants to build on the momentum from the FPN statewide summit and move forward with a collective effort to engage state government in a more strategic and sustained way.
2. **But how?** While there was consensus around *whether* to move forward (the common answer was “yes...and now”), the discussions surfaced some disagreements about *how* to move forward. Roundtable participants were presented with two preliminary options to discuss: an Office of Foundation Liaison (based on the model established in Michigan) and a state philanthropy commission. Each roundtable had a critical mass of participants who were eager to move full-speed-ahead with the OFL option, but each also had participants who urged FPN to lift up on the gas pedal, concerned mainly about whether each side was ready. There were also pockets of participants supporting the commission idea as well as less comprehensive efforts to inform—and in some cases push—state executives and legislators about Florida philanthropy’s role and resources.
3. **Customize OFL to Florida.** Participants who supported the Office of Foundation Liaison position urged FPN to make sure the model is adapted to the particular circumstances of Florida. In particular, a number of critical success factors were identified: the Governor’s commitment; the right person in the job; the definition of job, with sufficient independence from government (watch out for “the government’s tractor beam,” said one...“Avoid politicization” said another); ensuring that funding is sufficient / sustainable and that it comes from foundations, not government; the right accountability (“Who should be the Liaison’s boss?”, with consensus in one roundtable that it should not be the Governor).
4. **Recognize the trust gap.** Many participants expressed skepticism about partnering with government. One concern was whether such partnership might lead foundations to be “co-opted” by government’s agenda. Another asked, “Will the dollars get lost?” For many, the skepticism came from a deep lack of trust—a theme in every roundtable. “Government isn’t accountable.” Some said mistrust went the other way as well. “We (foundations) need to earn the right to lead,” a comment matched, almost verbatim, in another session. One participant hypothesized cause of government mistrust: foundations often don’t make for good partners. In other words, the issue of trust tied not only to a lack of *awareness* on their part but lack of *willingness* on ours.

5. **Define value and voice.** Many pointed to a lack of understanding of philanthropy's value proposition among government officials. We need to clarify what philanthropy can do—e.g. take risks—and can't do—e.g. a 1:1 match in funding—relative to government. Among the potential foundation contributions mentioned: dollars, knowledge, history, ideas, convening, accountability, independence, evaluator, visioning and “more strategic than charity.” Participants also identified lack of clarity and consistency about philanthropy's value among philanthropy leaders themselves. “Define the we,” said one participant in urging Florida foundations to shape a collective voice and agenda. Many saw the effort to better engage government as an opportunity to better articulate this value.
6. **Get better access.** Improved access was emphasized in two ways. The most frequent was the regularly highlighted need for more and better relationships with government officials. “We need a match.com for philanthropy and government.” And: “We need philanthropy and government people to *talk*.” The other way access was discussed was in terms of the need to be better plugged into ongoing formal networks, commissions and conversations. A phrase that came up at each of the four sessions: “We need a place at the table.” And it was noted that it is not enough to be at the table if foundations aren't seen as “equals at the table.” Another participant added that key to both relationships and a place at the table is “having the right messengers.”
7. **Educate both ways.** Finally, participants called for understanding in two directions—a better understanding among government officials of how foundations work and can help and a better understanding among foundations of how government works. On the former, one participant said that when government officials see foundations participating, “they only see coins on the table.” Many participants pushed for informing government officials through a series of FPN briefings, briefing books, speakers' bureaus, and outreach to government staff. “Position FPN as the ‘bat phone’” that government officials can call to get information about foundations,” said one.

Individual Roundtable Notes

West Palm Beach, May 12, 2009

Why do we want improved philanthropy-government engagement in Florida?

1. Recognition of philanthropy's value.
2. New, less politicized projects and better sustainability of funding for those projects.
3. Improve efficiency of state government (main) and save state government money.
4. More philanthropic giving—low likelihood of effective partnerships inhibits effective giving.
5. Better leverage of funding on both sides.
6. Philanthropy needs to better understand government and challenge ourselves.
7. Government needs to better understand foundations—even the mere existence of foundations as well as their diversity.

What's missing now from philanthropy-government engagement in Florida?

1. Trust!
2. A good part of the conversation focused not on what's missing from relationship/engagement but on what's missing from state government itself: Government model: give us your \$ and we'll spend as we see fit; lack of accountability.
3. Being seen as equals at the table...though it was added that this is difficult—there isn't a level-playing field and philanthropy doesn't have much political leverage.
4. Clarity on what philanthropy is and what philanthropy and government each bring to the relationship.
5. When program goes from legislative to administration, a lot can change.
6. Ongoing way for philanthropy and government people to *talk*.

How can we improve philanthropy-government engagement in Florida?

1. Explore foundation liaison in light of these issues: Concern about funding commitment required. One idea was to fundraise through community foundations and donor-advised funding. Need local representation and outreach. Need to avoid politicization. Need for liaison funding to come from foundations not government. Stay away from tying liaison to specific funding areas. Make sure liaison represents all state foundations, not just 15 funders. Need to design a model we'd like to see and only *then*

- examine dollars and feasibility. Make sure liaison understands top foundation concerns (identified via survey).
2. Before liaison, build relationships with thoughtful government administrators and elected officials *first*.
 3. Define success for both sides...think through *outcomes* before *vehicles*.
 4. Explore commission (though evidently less support in the room for this) in light of these issues: Make it 50/50 state and philanthropy composition. Do commission first, leading to OFL.
 5. Go gradual whichever option. One take: Build trust (Y1), define priorities (Y2), identify activities (Y3), establish liaison (Y4).

Tampa, May 13, 2009

Why do we want improved philanthropy-government engagement in Florida?

1. We need better access...and “the right messengers.”
2. Set tone across administrations.
3. Create change in government and the social sector by providing information on what works.
4. Get our dollars to go farther.
5. Support innovation.
6. Strengthen public-private partnerships.
7. Education about the what, who and why of foundations; how foundations can provide more than dollars and are different / more strategic than charity.
8. Better understand government.
9. Improve our message.

What’s missing now from philanthropy-government engagement in Florida?

1. What philanthropy wants to accomplish is long term. Government not in it for the long haul.
2. We’re missing an organized sector approach: infrastructure, communication, mobilized dollars and votes, focus on what we want.
3. A common philosophy of the role of government.
4. A relationship.

How can we improve philanthropy-government engagement in Florida?

1. Explore Foundation Liaison model in light of these issues: Critical factors include the right person in the job, the governor’s commitment, the right

definition of the position with sufficient independence from government (watch out for “the government’s tractor beam”), the right accountability (“Who’s the liaison’s boss?”). Consensus was that the liaison should *not* be appointed by Governor.

2. Little support for Commission idea.
3. Third approach discussed: the “Association Model.” Along lines of the state’s real estate or banker’s associations. This led to a discussion of FPN’s role: What’s the end game for FPN? Are FPN staff really the foundation liaison/s?
4. One issue is what we mean by “philanthropy.” Do we include service providers?

Orlando, May 14, 2009

Why do we want improved philanthropy-government engagement in Florida?

1. Clarify philanthropy’s value proposition.
2. We can be a neutral broker and educator (vs. advocacy).
3. Better communication.
4. Ongoing strategic relationship, partnership—in which state government “calls on us to help.”
5. Relationships.

What’s missing now from philanthropy-government engagement in Florida?

1. Relationships—the main thing identified. “We need a match.com for philanthropy and government.” Obstacles cited: state government turnover; distance; consistency; clear value proposition (both ways); mutual interest; not having “earned our way.”
2. Clear leadership roles for philanthropy.
3. We aren’t plugged into networks.
4. We aren’t learning *from* government.
5. We aren’t collaborating as much as we need to be with other like-minded public interest organizations.
6. We’re in different modes: government is in *survival mode* whereas philanthropy is more of a *strategic mode*.

How can we improve philanthropy-government engagement in Florida?

1. Explore “policy university” on philanthropy to build capacity of state government staff, especially on legislative side.

2. Explore a “notebook” presenting information about what philanthropy can do.
3. Explore getting a seat on the children’s cabinet.
4. Frame above efforts as steps on a journey to a Foundation Liaison position. Some disagreement heard about the field’s readiness to have a liaison. “We need to earn our way to a relationship.”
5. Make sure we’re responsive to *government’s* agenda.
6. Do a speakers’ bureau to connect with various government associations.
7. Need to clarify philanthropy’s value proposition: dollars, knowledge, history, ideas, convening, accountability, independence, evaluator, vision.

Jacksonville, May 15, 2009

Why do we want improved philanthropy-government engagement in Florida?

1. Better understanding among government officials of how foundations can help.
2. Better understanding among foundation leaders of how government works.
3. “Inform their discretion.” We need to strengthen advocacy and public will for programs that work, and need to develop long-term public vision around funding priorities.
4. More practically, access to conversations. “A place at the table.”
5. Better alignment with national funders working with state government officials. “We’re not on the same bus as national funders.”

What’s missing now from philanthropy-government engagement in Florida?

1. Many government officials think \$ = collaboration. “They only see coins on the table.”
2. Government doesn’t trust us. “We need to earn the right to lead.”
3. Government isn’t accountable.
4. Government doesn’t know how to connect to philanthropy, whom to ask, who’s doing what.
5. There’s a prevailing narrow definition of the role of government.
6. Philanthropy leaders wonder how we can really make a difference in partnership with government. “Will the dollars get lost?”
7. We’re uncertain about what kind of advocacy role for foundations is appropriate/needed.
8. We lack consistency/alignment with our nonprofit constituents.

How can we improve philanthropy-government engagement in Florida?

1. Start by strengthening our self-definition and role as a field and our collective voice. “Define the we.” (“Assuming it’s feasible to have a collective voice.”) Clarify what philanthropy can do (e.g. take risks) and can’t do (e.g. a 1:1 match in funding) relative to government.
2. Adopt a more specific collective agenda about what we want to achieve programmatically in the state.
3. Explore different models—think tank, advocacy, foundation liaison, commission—to inform government’s discretion and be the gadfly. Collect what works and nimbly present to players through briefing papers, conversations, etc. Two categories of elements were discussed here: (a) resources to provide government officials; (b) ways of connecting with those officials.
4. Do an audit of current state-level visioning efforts and determine if Florida foundations could have a voice / carve out a role.
5. Raise FPN’s profile. “Position FPN as the ‘bat phone’” that government officials can call to get information about foundations.