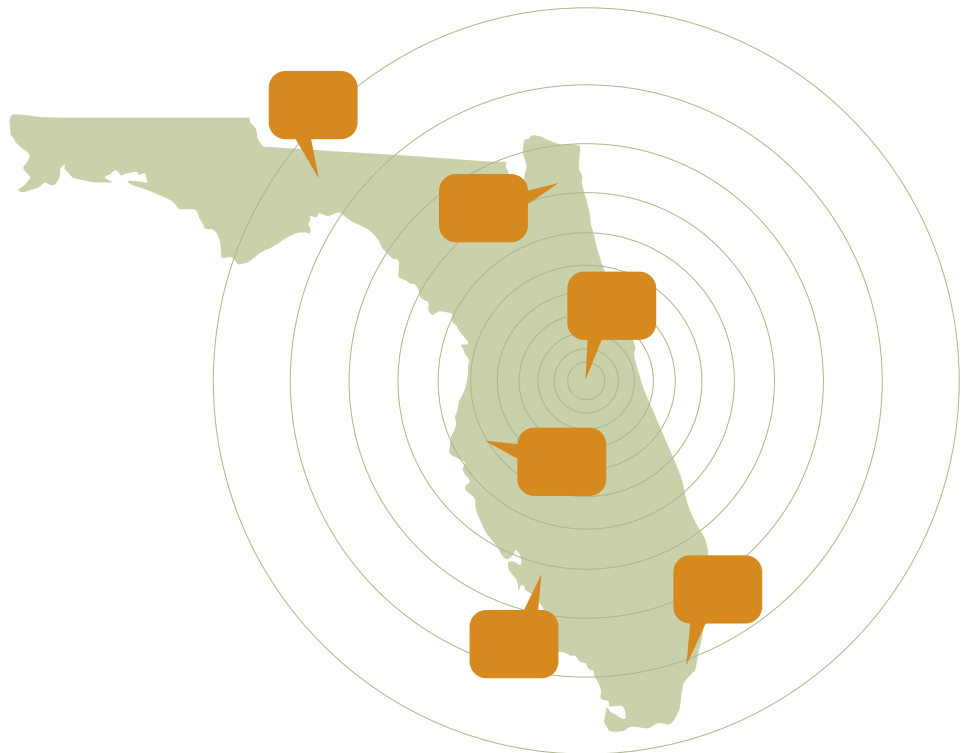


Not Exactly Retiring in Florida

A Statewide Summit Gets
the Philanthropy-Government
Conversation Moving



Katie Ensign, head of the Florida Philanthropic Network, knew her group's efforts were working when she got the phone call.

On the line was Bill McCollum, the state's Attorney General. McCollum wanted to partner with Florida foundations on gang violence prevention. What's more, he wasn't asking for money.

One month earlier, in January of 2009, FPN held its first statewide summit on philanthropy. McCollum was one of three high-profile state officials in attendance. The others were Alex Sink, Florida's Chief Financial Officer, and George Sheldon, Secretary of the state's Department of Children and Families. (Not long after the summit, McCollum and Sink both joined Florida's race for governor, on opposite sides of the ticket.)

Each state official had illuminating things to say about the role of foundations in Florida and philanthropy's partnership with government. But it was McCollum who was part of the summit's most memorable exchange.

Shack had named the elephant in the room.

In a panel titled "A Conversation about Florida's Economy," McCollum noted that government can't solve the state's social problems on its own and that foundations need to do their part.

"I agree, but that part isn't to be your bank account," Ruth Shack, former president of the Dade Community Foundation, responded. "Foundations can't do that. But we *can* be your R&D."

Shack had named the elephant in the room.

Foundations have long struggled to be seen as more than cash machines. So far, they haven't been terribly successful. In a Philanthropy Awareness Initiative study of news media coverage of foundations, only 1.4% of more than 38,000 articles were about the impact or benefits of foundation activity. The rest were just transactional.

Just as striking, only 11% of engaged citizens can name an example of a foundation's impact on an issue they care about. When most Americans think of foundations, they think money. This frame lives in the minds of government officials, too, and was just the thing Ruth Shack was challenging.

"I remember that moment," Sherry Magill, president of the Jessie Ball duPont Fund and one of the founders of the Florida Philanthropic Network, says about the McCollum-Shack exchange. "Ruth was in his face in a polite but forceful way. She was saying that our job as foundations is R&D—to let you know what works. And your job as government is to make sure those good things are implemented on a larger scale. We can't do that if we can't get into a conversation with you."

That philanthropy-government conversation—starting it, improving it, broadening it—was the big goal of that first FPN summit (the second took place earlier this year, with Florida government officials such as education commissioner Eric Smith and economic stimulus special advisor Don Winstead continuing the conversation).

Held at an Orlando hotel, the summit, “Growing Philanthropy, Shaping Florida,” brought together more than 125 representatives from philanthropy, nonprofit organizations, government and business. Because it took place only months after the economy narrowly averted disaster and only weeks after President Obama took office, the rooms buzzed with equal parts anxiety and energy. Panels were held on education, health, housing, and environmental issues in the state, with a focus on the opportunities the economic crisis provides for cross-sector partnership.

The leaders who formed the Florida Philanthropic Network, a statewide association of more than 50 foundations in the state, have spent the last several years trying to improve the way they approach the conversation with government.

“When we created FPN, we decided it wouldn’t only be an association of grantmakers to talk about the craft,” says Sherry Magill. “One of our founding goals was to build a conversation about the future of Florida that includes philanthropy, government and business. We operate out of a theory that there are three important sectors in the state. It takes all three for the American economy and democracy to work. The summit was an attempt to create a space and moment in time to begin that conversation.”

Leaders of FPN also envisioned a different kind of philanthropy-government conversation than the ones that had often taken place.

“It’s a twist on the usual approach to policymakers, which usually seems more like trying to sell or buy something. We’re looking for more meaningful dialogue,” says FPN’s Katie Ensign. “It’s foundation leaders saying to government leaders, ‘You’re working in this arena and so are we.’ And it takes both sides being prepared to listen, truly two-way communication.”

“Setting parameters is key,” she adds. “It’s what Ruth said at the summit: we don’t want you to look at us with dollar signs in your eyes. What we can bring to the table are programs that really work. We’ll say, ‘If you’re looking for money, let’s not talk just yet.’ You need to first build the partnership.”

Taking money off the agenda in conversation with other sectors—at least for starters—was an approach mentioned by other summit participants.

“We’ve always said, ‘Look, this is not about money—this is not an ask,” said Karen Aldridge-Eason in a panel on engaging government officials and other decision makers. “We can get there, but that’s not the way to start the conversation. We want foundations at the table because there’s information they can bring, there’s added value and knowledge.” At the forefront of efforts to connect philanthropy with government, Aldridge-Eason is Michigan’s Foundation Liaison, a cabinet-level position that helps broker strategic partnerships between the state and foundations.

“We’re looking for more meaningful dialogue. It’s foundation leaders saying to government leaders, ‘You’re working in this arena and so are we.’” —Katie Ensign

Another strand that emerged in summit conversations was the need for open communication by foundations.

“One of the greatest advertisers once said that having a great idea but not marketing it is like winking at a pretty girl in the dark. You know precisely what you’re doing but nobody else does,” said Harvey Massey, a Florida business executive active in philanthropy. “Whether it’s in politics or business, you have to get out and talk to people about your thoughts and plans and how much skin you’re willing to put in the game.”

George Sheldon, the Secretary of Florida’s Department of Children and Families, quickly responded. “I’ve learned something from Harvey today—I’ve been winking at foundations for the past two years,” he said. “I need to turn the lights on.”

In a speech later that evening, Florida Chief Financial Officer Alex Sink urged summit participants to keep the pressure on. “State officials need to hear from thought leaders like you,” she said. “The more you can mobilize around mission-critical issues, the more you can get us to go out and do. As FDR once said, ‘I agree with you. I want to do it. Now *make* me do it.’”

“I’ve learned something from Harvey today—I’ve been winking at foundations for the past two years. I need to turn the lights on.”

—George Sheldon

Three years ago, FPN’s board of directors intensified their focus on philanthropy’s communication and outreach when they were presented PAI survey data showing how few engaged Americans really understand foundations. For example, only 38% of these citizens can even name a foundation.

“The old position was defensive, even a little arrogant—‘*Of course* you know who we are,’” Katie Ensign says. “For the first time we saw how deep the lack of information about foundations was, and it changed the way we approached the conversation. So instead of coming at it from a defensive position, it’s now, ‘We’re guessing you don’t know what a foundation does. Let me tell you about who we are and what we do.’”

Many summit conversations explored the keys to better philanthropy-government partnerships in Florida.

One was the rising interest in making such connections in the first place. Another was the need for each side to better understand the priorities and practices of the other.

“We’re learning more and more that government cannot do this by itself,” said George Sheldon. “We recognize this is a partnership and has to be a partnership to work. Foundations have to understand where government is. Right now, we’re up to our heads in alligators, and we’re trying to drain the swamp. You have to look at where we need help to get through these tough times we’re in right now and how does that interplay with what your goals are. I think government has to understand how do we work with a foundation to achieve the goals the foundation was set up to do and at the same time enhance the services that drive government.”

On the foundation side, David Biemesderfer, FPN's vice president (and taking over as president this June), observes that external circumstances are driving some in the field to a new perspective. "The economy has motivated foundations to be willing to think differently in terms of partnering," he says. "With budget cutting, there's more motivation to work with other funders, private and public. And there's frustration with doing things the same way as always. There's more of a willingness to try something different."

"We've got to be in the business of rebuilding a strong country as foundations," says Sherry Magill. "You don't do that by ignoring policy or being afraid to engage with the people who write the laws."

Many of the summit's conversations landed on a common strategy for improving the philanthropy-government partnership: good old-fashioned relationship-building. "It really is all about relationships and picking up the phone, not just sending a letter or email," said George Sheldon. "It's about developing trust."

In addition to her statewide work with FPN, Sherry Magill has helped spearhead successful efforts with fellow funders to both partner with and put pressure on local government in Jacksonville, where the foundation she leads—the Jessie Ball duPont Fund—is located.

"You've got to just do it," she says. "What foundations have to understand is that collectively we know more than we need to know to do this. You don't have to do more analysis. You have to have the conversations and build the relationships. And don't go alone. If we want to move the needle, we have to do it collectively."

That fateful phone call from Attorney General McCollum to FPN's Katie Ensign—and the summit conversation that inspired it—led to a significant partnership with the Florida Attorney General's Office on gang prevention. Florida foundations are helping to convene and inform government, nonprofit and community representatives as they explore cross-sector collaboration and intervention strategies.

"We've got law enforcement working on one end, education on the other, government on another, and we really need to work together on this issue," McCollum said to Ensign. "I think foundations have a lot to offer, and we can learn from you."

"When the Attorney General calls you, you have to be able to pull it off and show your value," Ensign says. "And we did. Now that word is getting out, we're getting calls from others—Department of Education, the state's drug czar. The hardest thing is getting in, but once you are, word spreads fast and... you're in. The benefits are vast. But you need to be prepared and flexible. You can't be too scared to take the phone call because, if you don't, you're not going to break down any barriers."

"You don't have to do more analysis. You have to have the conversations and build the relationships."

—Sherry Magill

Case study written by Mark Sedway and Courtney Spalding-Mayer, Philanthropy Awareness Initiative, and designed by Karen Gibson.



The **PHILANTHROPY AWARENESS INITIATIVE** is a short term R&D project that works with foundations and philanthropy associations to improve communications and outreach to influential Americans. We aim to accomplish this purpose primarily by tracking how influential leaders see foundations and identifying, developing and sharing ways foundations can communicate about their unique role, work and impact in American society.

Better connecting with leaders in government, business, nonprofit and media for greater mutual understanding and impact is a critical opportunity for U.S. philanthropy today. It will help the foundation sector build necessary political support, take promising programs to scale, invite new ideas, and encourage more philanthropy. For more information, visit www.philanthropyawareness.org.

Project advisors: Chris DeCardy (the David and Lucile Packard Foundation), Daniel Silverman (The James Irvine Foundation), Darin McKeever (the Bill and Melinda Gates Foundation), David Morse (the Robert Wood Johnson Foundation), Eric Brown (The William and Flora Hewlett Foundation).