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Philanthropic Innovation



Developing Philanthropic Partnerships: Gulf Coast Economic Solutions Team

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Agenda

1. Introductions and background
2. Mining the Mabus Report
3. Philanthropic engagement overview
4. Foundation and association types
5. Telling your story
6. Wrap up and questions



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IPI

IPI Goals:

1. RESEARCH: Generate lessons, evidence, and best practice in housing and community development from the philanthropic and international sectors that can be applied to HUD's work
2. NETWORKS: Advance HUD's capacity and competency to achieve better results through innovation and multi-sector, multi-national networks, including leaders in philanthropic, corporate, NGOs, and academic arenas
3. COLLABORATIONS and CO-INVESTMENT: Develop collaborations that align ideas, investments, and resources for transformative and sustainable development in partnership with philanthropic and international partners



IPI Core Activities

- IPI works with two primary sectors – **International & Philanthropic**
- Within the International and Philanthropic sectors IPI provides support to HUD and PD&R in four activity areas:
 1. **Outreach & Information Exchange**
 2. **Client Management & Assistance**
 3. **Research & Knowledge Management**
 4. **Joint Research & Project Co-Investment**



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Mining the Mabus Report

- Large themes and specific topics/stories
- Narrowing down and finding the useful data, synergies, intersection points for engagement
- Adding your own specific topics, message, story – recommendations in report and topics/themes for localization
- Specific mentions of philanthropy starting with page 19 to page 100
- The pros and cons of the report recommendations in terms of philanthropic engagement (a common discussion)



Before Engagement

Before engaging philanthropic partners in any fashion, successful communities and organizations spend time doing:

Research – study market, community, region, “competition” (i.e. potential partners, including philanthropy) – differentiate need from demand and determine “your place in the world” ... (e.g. report)

Planning – strategic plan, business plan, fundraising plan, revitalization plan, etc. – setting out the road map but knowing the stops along the way...

And then ask yourselves... “Why and how do I want to engage with philanthropy?”



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Why Engage?



Types of Engagement

Direct:

1. Direct funding proposals
2. Direct partnership (other partners?)

Indirect:

1. Pooled funds or sub-grantee proposals
2. Indirect partnership/collaboration

Again, the “why” may dictate the “how”

(Earned revenue?)



Types of Funding

Operating Funds:

- Core (short/long term)
- Program (short/long term)
- Project
- Direct/indirect

How do these connect you (government, organization, community) to the larger picture for recovery, stabilization and sustainability for the region – where are the intersections?

You may also need...

Capital (Capitalization for loan funds, CDFIs):

- Borrowed
- Permanent
- Direct/indirect



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Diversify, Diversify, Diversify

This is important in the short and long term:

- Expands pool of sources and information to draw from (multiplier effect)
 - Decreases reliance on any one/few sources
 - Improves organizational stability and community knowledge/connection
 - Comforts/leverages funders and others
-
- And this is not just about the funds – diversity in partnerships if you can get them and maintain them is key



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Many Philanthropic Partners

You may engage some or all in the short and long term and for different reasons:

- Neighborhood Foundations
- Family Foundations
- Community Foundations
- National Foundations
- Corporate Foundations
- (Corporate CSR)
- (Individuals)



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Use Philanthropic Groups

Connecting with associations and special funding groups may be more synergistic:

- Neighborhood Funders Group
- Council on Foundations
- Emerging Practitioners in Philanthropy
- The Funders Network for Smart Growth and Livable Cities
- Living Cities
- Native Americans in Philanthropy
- Rural Funders Collaborative



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Everybody Needs a Story

- What is your story? Remember the report
- What makes your (organization, community, neighborhood) special?
 - Are you the only government, organization, community in the region doing the work?
 - Are you the first to be doing the work?
 - Are you the only organization, community doing the work in a unique way?
 - Are you the oldest/newest/strongest organization, community around?
 - Do you have a unique story? (the answer is yes, you just have to find it)
 - What is the unique issue? What is YOUR unique solution?



Practice the Story

- Leadership, management, staff, especially those that are in the community and have the “face time”
- Picture yourself on an elevator (you have 30-90 seconds)
- Now picture yourself on an elevator with your grandmother or aunt!
- Will your story translate for the philanthropic partner(s)?
- Can they retell your story to other philanthropic organizations, potential local, regional partners?



Where is the Synergy?

- Where does the philanthropic partner fit in? (and other partners)
 - Roles
 - Leadership
 - Policy
 - Practice
- Is there a topical connection better than just your story? (is it “our” story?)
 - Entrepreneurship (tourism, fishing, access to capital, etc.)
 - Health (clinics, food, access to services)
 - Cultural/Social
 - Sustainability (beyond recovery into



Remember

- **Know why you are engaging and be as transparent as you can about it:** funding, leadership, leverage, other partners, knowledge, community connections, etc.
- **Plan how you are engaging:** research, planning, timing, approach, etc.
- It may take new staff and new thinking – no specific rules for this, but the capacity and the knowledge (maybe risk) has to be there
- It's not about you. Don't take it personally (this is for the fundraising people in particular)
- It takes time – in the short term, long term and in building relationships
- There will be more than one chance for the engagement (knowing that there is urgency and timing)
- The more the merrier!...



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Questions?



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Contact Us:

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