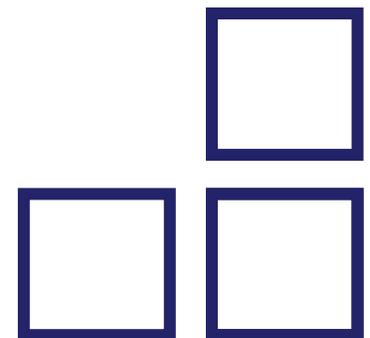


Collaboration in the CDC Sector

Advancing the Discussion



Agenda

■ Introductions/Welcome

- Geeta Pradhan, The Boston Foundation and Bob Van Meter, LISC

■ Presentation

- Carole Carlson and Hollis Van Inwagen, New Sector Alliance

■ Panel Discussion

- Moderated by Bob Van Meter, LISC
- Jeanne Dubois, Fairmont Collaborative
- Carl Nagy-Koechlin, South Shore Housing Development Corporation
- Miguel Rivera, HomeOwnership Center of Worcester
- Mullin Sawyer, Oak Hill CDC and HomeOwnership Center of Worcester
- Steve Stanton, New Sector Alliance

■ Q&A

- Moderated by Joe Kriesberg, MACDC

Project Scope

■ Objective

- Conduct case studies of existing collaborations within the CDC sector to draw out and disseminate best practices

■ Research

- Background research on the CDC sector, nonprofit partnerships
- Phase 1 Report from the Mass Innovation Forum
- Stakeholder Interviews
- Original evaluation framework and criteria to apply in assessing the case study partnerships

■ Case Studies

- Home Ownership Center of Worcester (HOCW)
- Fairmount Collaborative

■ Factors assessed

- Impetus for, origins and establishment of the partnerships
- Factors contributing to the partnerships' successes and opportunities
- Opportunities to deepen or broaden the collaboration

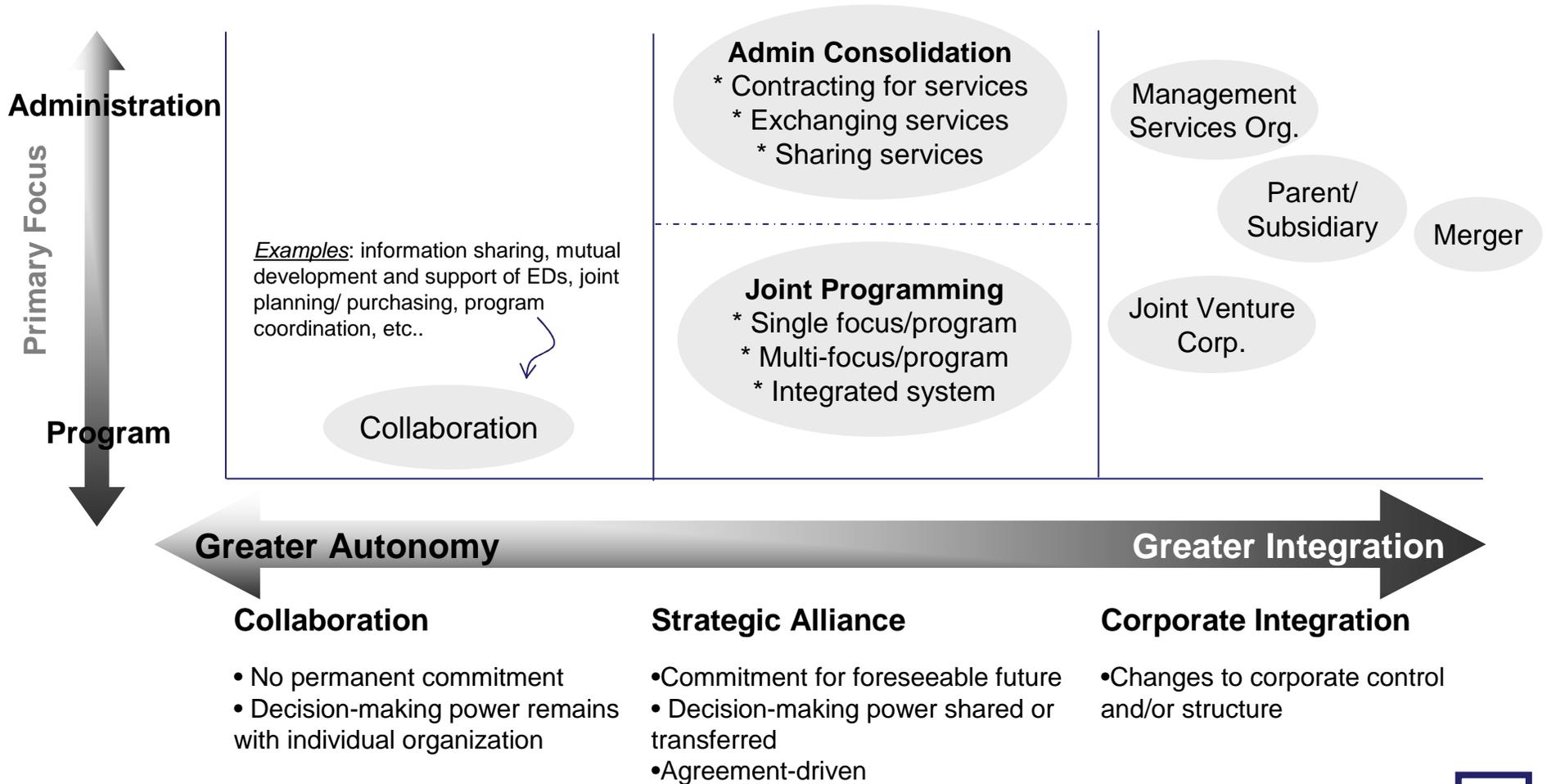
■ Deliverables

- Strategies to promote and support strategic partnerships
- Best practices for achieving successful (high-quality, high-impact) strategic partnerships

Strategic partnerships are worth revisiting in difficult times

- The global economic crisis and collapse of housing market has left many CDCs in financial stress
- CDCs have history of partnership; current crisis presents a moment of opportunity and catalyst for improvement of strategic alliances among CDCs
- Successful existing partnerships can provide insight for further collaboration:
 - HOCW and the Fairmount Collaborative are two prominent cases of CDC strategic partnerships: achieved impressive results, overcame common challenges
 - Case study lessons allow CDCs to deepen existing partnerships or broaden their impact by creating new strategic partnerships with well-aligned partners

Collaboration/consolidation opportunities fall on a continuum



Strategic Restructuring

Case study partnerships

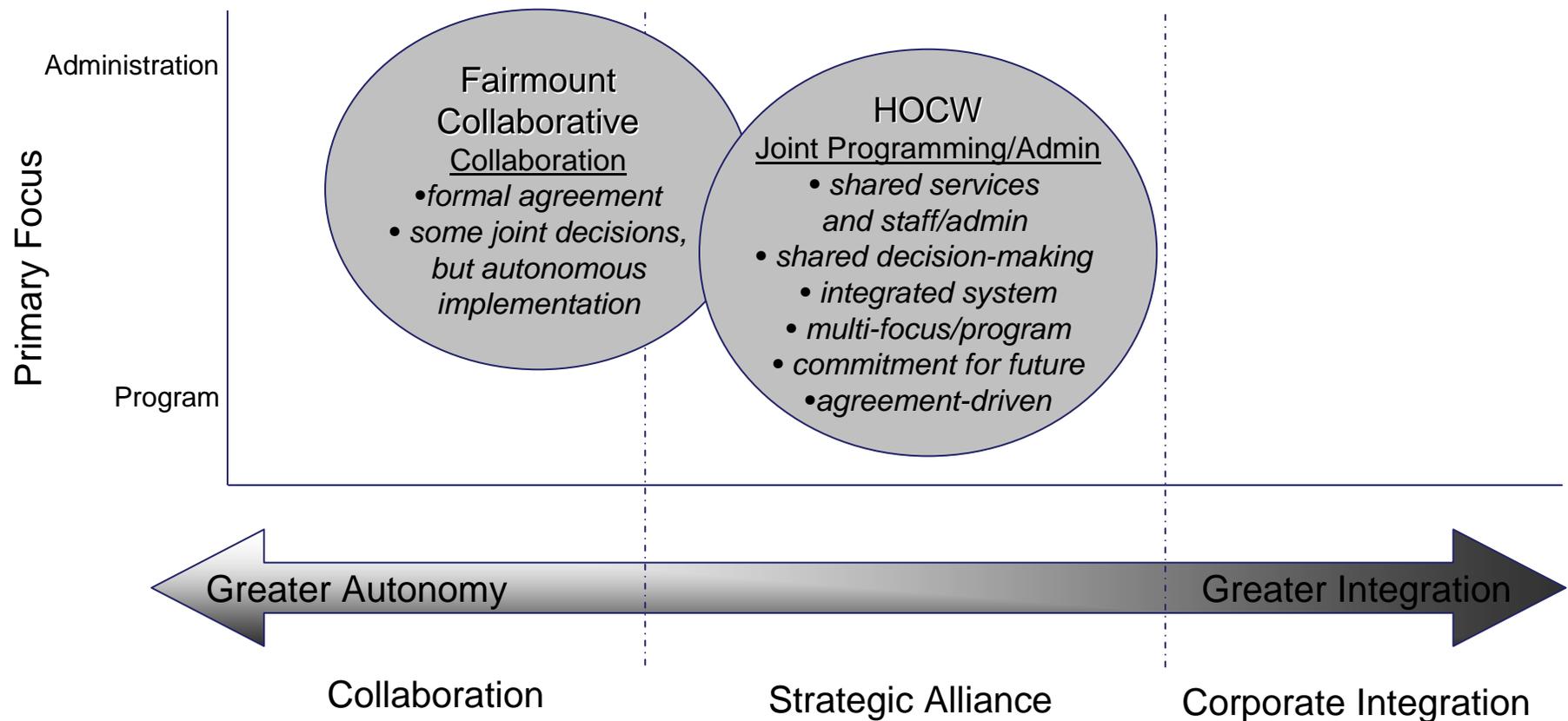
Home Ownership Center of Worcester

- **Partners:** Neighborworks, Oak Hill CDC, Worcester Community Housing Resources, Central Massachusetts Housing Alliance, East-Side CDC, Worcester City Manager's Executive Office of Economic and Neighborhood Development
- **Mission:** Revitalize distressed neighborhoods and improve the quality of life in the City of Worcester and its surrounding communities through the expansion and strengthening of homeownership by increasing the stock of sound housing and increasing investment
- **Overview:** Collaboration of Neighborworks, City of Worcester and CDCs initiated in 2002, expanded as needs have grown. Staff from participating organizations staff a central office and offer a broad array of services

Fairmount Collaborative

- **Partners:** Dorchester Bay EDC, Codman Square NDC, Mattapan CDC, Southwest Boston CDC
- **Mission:** Create strong, vibrant, and diverse communities along the corridor, providing mixed-income housing and access to decent paying jobs, and supporting strong civic engagement
- **Overview:** Collaboration of four contiguous CDCs to create a larger power base to support smart transit-oriented development. Also works with the Fairmount Coalition (transit equity focus) and Fairmount Greenway Task Force (preservation and recreation focus).

The partnerships fall on different places along continuum



Case study partnerships highlight opportunities

HomeOwnership Center of Worcester

Key Successes:

- Increased access to capital for center
- Centralized operations to increase efficiency
- Improved external relationships

In Progress:

- Providing additional services and programs
- Strengthening individual partners

Opportunities:

- Formalizing governance structure
- Increasing outcome measurement

Fairmont Collaborative

Key Successes:

- Increased access to capital for TOD projects
- Established outstanding city/funder/community relations

In Progress:

- Providing additional programs and services
- Strengthening individual partners

Opportunities:

- Deeper programmatic and administrative integration

Best collaboration practices for CDCs in four areas

Program Impact

- Engage complementary partners
- Conduct self and market assessments
- Select meaningful metrics
- Market programs and services

Community Buy-in

- Tailor services per market assessment
- Maintain constituent engagement
- Form relationships with other community institutions
- Build trust with funders
- Self-promote

Financial Strategy

- Engage public and private funders early
- Anticipate overhead costs
- Increased savings by sharing resources
- Clear, consistent accounting

Structure

- Discuss expectations early
- Have a clear, thorough and flexible MOU
- Maintain regular, open and documented communication
- Standardize training and HR

Best practices for funders/intermediaries in four areas

Bring partners to the table

- Present the evidence in support of collaboration
- Address CDC concerns
- Set clear expectations for funder/ lender roles and commitments

Offer technical assistance

- Offer support:
 - Discussion facilitator
 - Legal counsel
 - Technology
 - Senior management time
- Invest in pre-collaboration costs as well as ongoing operations

Collaborate with other funders

- Lead by example when it comes to collaboration
- Hold regular joint funder meetings
- Increase the size of the funding pool

Support innovation

- Measure partnership impact to demonstrate success
- Fund innovative models of collaboration

Some closing thoughts

- Integration is difficult, costly and emotional
 - This is especially for place-based organizations like CDCs with deep community roots
 - Diverse personalities and organizational cultures make collaborating even more challenging
- Planning successful collaborations is highly resource intensive
 - Involve funders early and often
 - Take advantage of current momentum to engage potential partners and supporters
- Partnering for collaboration's sake is rarely successful – the most successful collaborations draw on complementary strengths to build even stronger institutions
- A successful strategy is to collaborate first to broaden programmatic effectiveness and reach while building trust
 - Get on the partnership continuum, then move towards deeper and broader impact

Panel Discussion

PANEL

- **Bob Van Meter**, *LISC Boston, Moderator*
 - **Jeanne DuBois**, Dorchester Bay Economic Development Corporation
 - **Carl Nagy-Koechlin**, South Shore Housing Development Corporation
 - **Miguel Rivera**, HomeOwnership Center of Worcester
 - **Mullen Sawyer**, Oak Hill Community Development Corporation and HOCW
 - **Steve Stanton**, New Sector Alliance

Q&A

- **Joe Kriesberg**, *Executive Director, MACDC, Moderator*