

# REFLECTIONS

on Making Connections

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## A Path Less Traveled

Reflections on the Approach  
*Making Connections* Used  
To Start a Long-Term Initiative To  
Transform Struggling Communities

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*"We thought we would take the path less traveled and wait awhile to see if we could establish the relationships and build the knowledge that we needed."*

— Ralph Smith

The Annie E. Casey Foundation's *Making Connections* initiative began its work in local communities by having senior foundation staff take on the role of "Site Team Leader." Asked to reflect about this role, these "STLs" offer some very interesting perspectives about the challenging process of implementing a national initiative in communities across the country.

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## About This Report

This report is based on 13 interviews of people involved in the early years of *Making Connections*. They include eight “Site Team Leaders” and five “Local Site Coordinators.” Most of these interviews were conducted in 2007.

***Making Connections* is a long-term initiative begun by the Annie E. Casey Foundation in 1999.** Its core strategy is based on the belief that the best way to improve outcomes for vulnerable children living in tough neighborhoods is to strengthen their families’ connections to economic opportunity, positive social networks and effective services and supports. To do this, *Making Connections* works closely with residents of these neighborhoods, community-based organizations, local government, businesses, social service agencies and local funders.

The Diarist Project has been a way for the foundation to document and learn from this initiative. Diarists have recorded the thinking of those most involved in implementing *Making Connections*. Diarists also observed how *Making Connections* developed in their sites, wrote stories about site developments (including the lessons others could learn from these stories) and interviewed a range of people for reports on critical topics. For more about the diarist work, see page 37. For more about *Making Connections*, go to [www.aecf.org/MajorInitiatives/MakingConnections.aspx](http://www.aecf.org/MajorInitiatives/MakingConnections.aspx).

*All photos by MaryAnn Dolcemascolo, except page 26, by Joe Rubino.*

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*“People thought we were crazy. A national foundation is going to launch a multi-site initiative and not use a local intermediary organization in each site? People didn’t think we could do it.”*

*—Ralph Smith, Senior Vice President, Annie E. Casey Foundation*

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A Report by The Diarist Project

Written by Tim Saasta

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## People Interviewed for this Report

**Denver** Local Site Coordinator *Susan Motika* was interviewed by Diarist Liaison **Grace Giermek**.

**Denver** Site Team Leader *Garland Yates* was interviewed by Diarist Coordinator **Tim Saasta**.

**Des Moines** Site Team Leader *Ira Barbell* was interviewed by Des Moines Diarist **Kristin Senty**.

**Hartford** Site Team Leader *Debra Delgado* and Local Site Coordinator *Ana Maria Garcia* were interviewed by Hartford Diarist **Mike Salius**.

**Indianapolis** Site Team Leader *Donna Stark* and Local Site Coordinator *Lena Hackett* were interviewed by Indianapolis Diarist **Will Fay**.

**Louisville** Site Team Leader *Sammy Moon* was interviewed by Louisville Diarist **Laura Crawford**.

**Oakland** Site Team Leader *Bart Lubow* and Local Site Coordinator *Fred Blackwell* were interviewed by Oakland Diarist **Bill Wong**.

**San Antonio** Site Team Leader *Victor Azios* was interviewed by Diarist **Linda Wilson**.

**White Center/Seattle** Site Team Leader *Bob Giloith* and Local Site Coordinator *Theresa Fujiwara* were interviewed by White Center Diarist **Bob Shimabukuro**.

**White Center** Technical Assistance Resource Center (TARC) Liaison and Atlanta Civic Site Leader *Gail Hayes* was interviewed by Atlanta Diarist **Sarah Torian**.

# Introduction

When the Annie E. Casey Foundation began thinking about how to design a new, very long-term, multi-site initiative to jump start a change process in challenging neighborhoods, it studied all the major community change initiatives that had come before. It consulted with more than 600 people.

The plan that emerged from this process surprised many people. What perhaps surprised them the most was the absence of a local “intermediary” organization that would manage the initiative’s work in each site. All previous “Comprehensive Community Initiatives,” including its own, had started with local intermediaries: perhaps a local United Way, community foundation or long-existing non-profit organization.

Instead, the Casey Foundation decided to assign its own senior staff people to be “Site Team Leaders” who would work with teams of local people and other foundation staff to develop and manage *Making Connections* in each site.

**Why should people care about how the Casey Foundation started this initiative?**

One reason is simply the scope of *Making Connections*: an investment of tens of millions of foundation dollars over 10 years in 10 cities. It is one of the largest and longest-running initiatives of any national foundation involving issues related to poverty.

But the other reason to learn from *Making Connections*’ experiences is that they have much to teach any national entity that wants to implement its programs or ideas locally.

*One reason to learn from Making Connections’ experiences is that they have much to teach any national entity that believes it needs to work locally to implement its programs or ideas.*

What’s the best way to work locally? Do you find one main local partner? Or do you send in staff to build a partnership among several local organizations? If you use your own staff, who? Existing staff? Senior staff? Or do you bring in outside staff or consultants?

Which skills do they need? What training? Which roles do they play for a funder that wants to go beyond making grants? How much time will this take? How do these staff people walk the line between the funders’ interests and ideas and their sites’ interests and ideas?

To examine questions like these, the *Making Connections*’ diarists interviewed 13 people who were either Site Team Leaders or “Local Site Coordinators,” the local consultants that most STLs decided they needed to have in their sites.

This report communicates what these people as well as the Casey Foundation itself learned about this nontraditional approach to beginning a long-term, community change initiative.

**W**hy did the foundation choose this approach? “Our thinking was that the local intermediary approach hadn’t really worked all that well,” explained the Casey Foundation’s Ralph Smith. “At the outset of an initiative, you are still inventing. You’re still fine tuning. You’re still learning.”

As a result, Smith added, the foundation needed “an agility and flexibility and nimbleness at the outset.” But once an intermediary organization is selected and a grant agreement drawn up, he believes that flexibility disappears.

As does the foundation’s direct connection with the site. “We didn’t think we could learn as much if we had an intermediary between us and what was happening on the ground,” Smith said.

Plus, selecting one organization to be the intermediary often drives other organizations away from the table, the foundation believed. *Making Connections* was supposed to be about connecting these organizations and helping them work together.

“We knew we needed a whole lot of people on board,” Smith added. “But we saw that choos-

ing an intermediary created winners and losers. People who weren’t chosen walked away. Then you had to invest a lot trying to get them back.

“We said that one way to keep the table as full as possible was to not choose among them and give one elevated status, a big grant, with everybody else grumbling. We would be inheriting that organization’s luggage and their baggage.”



Casey Foundation Vice President Ralph Smith didn’t want to immediately choose an intermediary and create “winners and losers.”

*“What we had learned is that relationships matter. We had to invest the time, the effort and the presence to develop really meaningful relationships. We didn’t think we could do that as well if we had an intermediary.”*

—Ralph Smith

By sending a senior staff person to each site, the foundation could build relationships with a range of people and organizations in that site as well as develop a deeper understanding of the site.

“What we had learned from *New Futures* and many other initiatives is that relationships matter,” Smith explained. “We had to invest the time, the effort and the presence to develop really meaningful relationships. We didn’t think we could do that as well if we had an intermediary.”

These relationships have been invaluable, Smith thinks, in the foundation’s ability to learn about the sites. Early on, he says, “We didn’t know enough to make a smart decision.” But over time, the relationships it developed “allowed us to learn about capabilities, willingness, commitment.

“We thought we would take the path less traveled and wait awhile to see if we could establish the relationships and build the knowledge that we needed.”

**O**ver time, Smith believes that the foundation and the sites have learned a great deal, knowledge that has allowed the foundation to go through a process of transferring management to organizations in the sites.

“If we had made a decision eight years ago, we would have made a series of bad decisions. We



*had plenty of that experience ourselves and among our peers. If you make a decision too quickly, with too little information, it is likely to be a bad decision."*

Instead, *Making Connections* now has designated "local management entities" in five of its sites. These LMEs include a community development organization (White Center/Seattle), a United Way (Denver), a community foundation (Indianapolis), a long-established settlement house (Providence) and a joint entity that includes a government agency (San Antonio). Smith has *"a really high degree of confidence"* that these decisions about local intermediaries are good ones and that *"we have high capacity partners who are willing and interested in taking up the work."*

This transfer of management from the foundation to the sites has been the subject of a series of reports by the diarists, all of them based on interviews with numerous people in each site (to see these reports go to [DiaristProject.org](http://DiaristProject.org)).

This report focuses on what's been learned about this unusual approach this national foundation used to start a multi-site initiative. Site Team Leaders and Local Site Coordinators were asked a series of questions about the Site Team Leader role.

- They were asked about the overall role the STL played, including questions about the range of skills and experiences that the STLs brought to this work. Did it make sense to have senior foundation staff people leading the work in each community?
- They were asked about the many and varied roles this person played. Was it too much to ask of one person? How important was the role the STL played in connecting the site to the foundation and vice versa?

***"The STLs were very independent. They were all senior. They all had expertise. They all had standing within the foundation and outside the foundation."***

***—Garland Yates***

- And they were asked what it takes to do this work well. What combinations of skills, experiences and temperaments allowed people to perform this work well? What training did they need?

**W**hile the focus of these interviews was on the STL role, that role was so crucial in the development of this initiative that, in many cases, the interviews became a much broader reflection about how *Making Connections* began and how it evolved over the years. Several of the interviews were quite long; one was 18 pages.

Several people used the interview as an opportunity to reflect on how the initiative was initially designed, how it changed over time, the role the foundation played in these changes and more. Some of the tensions that existed among STLs emerged. Some of the stresses that *Making Connections'* initial leaders felt were expressed.

The result is a very interesting window into this major investment in community change. Through this window, people can get a glimpse into the inevitable differences of opinion about this investment. The hope is that much can be learned from reading these multiple perspectives.

# Did it make sense to have senior foundation staff lead the work in each site? Why?

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Nearly everyone agreed that it made sense to have senior national foundation staff lead this initiative as it began. But they sometimes emphasized very different reasons.

- Several people said that using senior staff members was a clear and important demonstration of the foundation's long-term commitment to this initiative. This in turn helped the foundation connect with key local stakeholders.
- Senior staff could also clearly communicate what the foundation was thinking and how it came to the ideas that were at the core of this new initiative.
- These staff were also able to respond to local concerns, some of which were based on previous initiatives that had fallen short.
- By spending so much time in their sites, the STLs could learn a lot about the stakeholders, local history, current thinking, tensions, relationships and more, all of which many people saw as critical to building momentum behind the foundation's initial set of ideas.
- As senior people within a large, national foundation, they could connect their sites to other resources within the Casey Foundation.
- They could also connect their sites to the foundation's evolving thinking about *Making Connections*, which was particularly important because the foundation's leaders had purposefully left open the design so that it could be influenced by what it was learning in the sites. Plus, as

senior staff, the STLs had a role in communicating their sites' ideas to the foundation as it was formulating its plans.

- Finally, as senior staff and as outsiders to these communities, the STLs could perform a catalytic role. They could prod local people to acknowledge where their work may be falling short and that they needed to be open to new approaches.

**M**any people emphasized the importance of the foundation assigning senior staff to be STLs to demonstrate its commitment to this work. *"We needed to demonstrate the commitment of Casey to the work, to a different way of doing the work,"* noted **Lena Hackett**, Indianapolis' local site coordinator. *"Any foundation can give a grant, but the demonstration by Casey of putting their senior leadership on the front line made this different from day one."*

**Gail Hayes**, site team manager of the Casey Foundation's Atlanta civic site who assisted the White Center/Seattle site early on, said some-

*"Any foundation can give a grant, but the demonstration by Casey of putting their senior leadership on the front line made this different from day one."*

—Lena Hackett



thing very similar. *"I think that taking the best and brightest in the foundation...sent the message to everyone that this is a very important initiative for the foundation."*

Indianapolis Site Team Leader **Donna Stark** agrees, saying that her constant presence at local meetings over several years *"surprised and impressed community leaders and residents alike."*

This in turn helped the foundation *"connect with other key stakeholders and partners"* and *"leverage commitment,"* noted Denver local site coordinator **Susan Motika**. *"Someone hired locally in the beginning would have difficulty doing that,"* she thinks.

*"We needed someone to make the deals happen, put the partnerships together, put all of the possibilities together,"* Motika explained. Having a senior staff person communicated the message that, *"This is a national foundation that believes in this initiative and we want your commitment."*

Denver STL **Garland Yates** agrees about the importance of using senior staff as STLs. *"The STLs were very independent. They were all senior. They all had expertise. They all had standing within the foundation and outside the foundation."*



STLs like **Garland Yates** worked closely with local site coordinators like **Susan Motika**.

Being a senior staff person helped, Yates thinks. *"People give you some leeway just because you are a senior foundation staff person. They feel like you are there to deliver resources. That puts them in a serious listening mode."*

*"Who does the mayor send to a meeting—the deputy mayor or a liaison,"* Hackett asks. *"That tells you something right there."*

*"We needed someone to make the deals happen, put the partnerships together, put all of the possibilities together. Someone hired locally in the beginning would have had difficulty doing that."*

—**Susan Motika**

**S**ending senior staff also allowed the foundation to better communicate what it wanted to achieve with **Making Connections**, Motika believes. *"No one could have articulated that vision like Garland Yates."*

**Bart Lubow**, Oakland's STL, thinks that this function of communicating the foundation's thinking was the main reason *Making Connections* needed senior staff people to act as the STLs. He says this was particularly true because of *"how undefined the actual initiative was."* He says that *"much of what the STL did essentially was to try to make sense out of things as they emerged."*

The key, says **Yates**, was not just making sense of the foundation's vision for *Making Connections*, but also answering all the questions that local people had. *"The relationships between the foundation and local folks are very tentative in the beginning. There are a lot of questions about what the foundation is up to. Are they for real? What are they really trying to do? A local person couldn't deal with these questions as directly as they needed to be dealt with. The STL put the foundation at the middle of things and made it less of a disconnected player."*

In many sites, having a senior foundation person was also critical because of the foundation's past history in these sites. In Denver, for example, the foundation had recently run two initiatives, the Rebuilding Communities Initiative and the Jobs Initiative.

*"The expectations of people who had prior relationships with Casey about the role they would play complicated things in the early going," Yates believes. "It would have been worse without a person on the ground. Being present, I was able to navigate these things and mitigate some of the adverse dynamics."*

**A** big advantage of having of having senior foundation staff people lead the work locally is that they were outsiders, believes Des Moines' STL, Ira Barbell. He noted that one definition of an "expert" is somebody from out of town.

*"This was about bringing in a set of ideas and trying to engage and mobilize the key leadership in a community about moving an agenda forward. It was going to challenge them to reexamine what investments they were making, how they got to where they are today, and do they want to do something different? If they did, they were going to have to change something."*

Barbell believes that an outsider, especially one from a foundation that was respected for its knowledge of what works, can help set in motion this process of change. *"An external person does not bring in baggage,"* Barbell explains.

*"And we brought in a level of expertise.... We were able to leverage the positive view that people had of Casey to get this set of conversations off the ground. A national staff person coming in that way was extremely important."*

The Atlanta Site Team manager, **Gail Hayes**, says something very similar. *"The best Site Team Leaders stretched the local teams. It made for a better initiative to have somebody from Casey stretching and broadening the local team."*

Denver local site coordinator Susan Motika goes even further in talking about the catalytic role played by Yates. *"He brought the power and strength of his own mission and vision to this work, and that was catalytic. He was so firm and so insistent that he inspired a generation of people in this work in Denver."*

***"The best Site Team Leaders stretched the local teams. It made for a better initiative to have somebody from Casey stretching and broadening the local team."***

**—Gail Hayes**

Motika adds that, *"Many partners have said that, 'If Garland had not insisted on this new way of doing business, would we be where we are today?'"*

**I**nvolving a senior staff person also had an impact back in Baltimore, where the Casey Foundation is based. The STLs could connect each site to other Casey staff and resources.

*"The Casey Foundation is a large national foundation with lots of moving parts,"* explains the late **Debra Delgado**, who was Hartford's original STL. *"There are many distinct units within the foundation.... It was really helpful to have [someone] who understood all these various elements and who could articulate to the local communities how these resources could be drawn upon."*

Indianapolis STL **Stark** notes that, over time, *"because of our relationships, we were able to connect folks in Indianapolis to PRIs [Program-Related Investments] and MRDs [Mission-Related Deposits]. This was a very important part of the role."*

**Ana-María García**, Hartford's local site coordinator, thinks that connecting the sites to the foundation's "other pieces" was one of the most critical parts of the STL role. However, she thinks the STLs varied a lot in their ability to do this. *"In reality only those STLs who had relationships with the other foundation staff...were able to do this effectively."*

The STLs could also connect the sites to the thinking that was taking place in Baltimore, Stark added. *"It was very important that the Site Team Leaders could communicate to their sites shifts in direction. In the absence of that intimacy [with what the foundation's leaders were thinking], everything would have felt very abrupt."* Having this knowledge gave Indianapolis *"a level of understanding of what we were thinking so we could all act in an aligned way."*

Stark believes that this ability of an STL to communicate the thinking and learning that drove changes in *Making Connections* was critical. This was particularly true when the initiative shifted from one stage to another, such as the transition from its early emphasis on relationship building to a harder focus on results. At these times, Stark believes that the STLs had *"to manage transitions of strategies, ideas and partnerships"* so that their sites knew *"where we were and had a vision of where we needed to go and saw a pathway for getting from one place to another."*

**W**hat was tricky about the Site Team Leader role was that it was always a two-way street. The STLs needed to communicate what the foundation was thinking to their sites. But they also needed to communicate what the sites were thinking and doing to the foundation.

Indeed, the ability of the STL to communicate what was happening in the sites was the main advantage of the STL approach, according to Fred Blackwell, Oakland's local site coordinator.

He points out that the fact that the Casey Foundation assigned senior staff to the *Making Connections* sites reflects the fact that Casey is an "operating foundation" as opposed to a strictly grant-making foundation. What you think about the STL role depends on what you think about the appropriateness of a foundation implementing its own programs, he believes.

*"I support this notion because it's important to be able to balance the policy, theory and grant-*

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—Donna Stark

*making roles that national foundations traditionally play with having these roles informed by actually having your feet on the ground."* Having people in the sites, Blackwell believes, allowed the foundation to do *"a tremendous amount of learning"* from what the sites were doing to build communities and improve outcomes for children.

The other side of the coin, Blackwell adds, is that the STLs, because they weren't from the communities, often had *"a steeper learning curve to understand the dynamics, politics and context in which they are working, which is all*

*very important to be effective. It probably created a slower ramp-up time for the foundation to really get its work going. There was a lot of learning the STLs had to do about the cultures of the communities in which they were working."*



Hartford's Ana-Maria García thinks that the STLs' ability to connect sites to foundation resources was critical.

Yates agrees that the STLs needed to do a lot of learning, which he thinks was a good thing. *"Having someone on the ground helped*



*the foundation very quickly come to know the local scene. They helped it become familiar with the local dynamics, the local culture. That gave us a better notion of how to proceed with Making Connections."*

Having staff people in the sites "put the foundation in the middle of things so it didn't have to relate to people through a screen or a translator. It helped us get up to speed pretty quickly about who the key players were that we needed to relate to."

**O**f the 13 people interviewed, only one person fundamentally questioned the wisdom of starting Making Connections by having senior foundation staff people lead the work in the sites. That was San Antonio Site Team Leader Victor Azios. The reason involved the different skills and experiences that the STLs brought to this role.

*"The basic idea of having a Site Team Leader who was a national staff person made sense initially," Azios said. But his view changed as he came to know the other STLs, most of whom he thinks had system change experience but not community change experience.*

*"They didn't necessarily have the 'on-the-ground' or 'in-the-field' experience with the community. I came to see that one of the problems with how we put together Making Connections was that most of the STLs truly didn't have a working knowledge of community, its dynamics and how to organize it, and how to operationalize ideas in ways that are respectful of community participation."*

While Azios came to be skeptical of the STL approach, he does not think that the more traditional approach of working with an intermediary would have been better. *"Historically, when you come in with an intermediary and really don't know the lay of the land, you tend to fall into that organization's history with the community—which already might have been factionalized."*

How would Azios have started Making Connections? He would have tried to hire

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***—Victor Azios***

people to lead the work in the sites who both understood the funding world but also *"understood how communities function and the whole concept of building on the assets within the community."*

## **Should someone local have been hired very early to help manage the work? Why?**

Most of those who answered this question thought that it probably would have helped to have hired a local person sooner. Several STLs realized pretty quickly that they needed someone, but it took a couple of years before all the sites had local site coordinators.

Louisville's STL, **Sammy Moon**, says that, *"In hindsight, I think that having someone locally who is your key point person and knows your community well—who knows the history of what had been tried before and what worked and didn't work—is important."* He thinks finding someone with this knowledge *"could have helped us avoid some mistakes and move the work quicker."*

**Lubow**, Oakland's STL, also thinks hiring someone locally sooner would have helped. *"Was the distance, the lack of presence on a daily basis, the relationship to [local funders], the power differential, the lack of as much familiarity with context as somebody who lived in the site might have had—did these factors conspire against the*

effectiveness of the STL as the leader of the site? In some ways, I think they did."

Des Moines STL **Barbell** thinks that a local person was needed after the first year. "It worked well for maybe the first year, when we were introducing the concept of Making Connections. It was a lot of meetings and conversations about the work. We were not in an implementation stage. It was more building awareness, trying to engage people and building relationships." All of this could be done by someone coming in from out of town, Barbell believes.

This changed when *Making Connections* began making grants and taking actions. "Then it became harder for me to know what was going on [so I could] identify and engage people at the right moment. There were learning moments and I was out of town. The more you move this to action, the less capable a person from Baltimore is able to stay on top of the complexities of this work."

**T**he main disagreement about hiring a local coordinator concerned when that person was needed. "In the early phase," says Oakland site coordinator **Blackwell**, "it was very appropriate to have an STL. In the middle phase, getting past the get-to-know-yous and getting into the work, it was important to have a combination of the STL with a strong site coordinator so that there was this two-way conversation going on, with two people sharing information, frustrations and challenges."



In the second phase, Louisville STL **Sammy Moon** believes "you really had to have some presence on the ground."

White Center Coordinator **Theresa Fujiwara** agrees. The foundation didn't need a local person early on

*"In the middle phase, it was important to have a combination of the STL with a strong site coordinator so that there was this two-way conversation going on, with two people sharing information, frustrations and challenges."*

—Fred Blackwell

when it "was still trying to define what this initiative was going to look like." But as soon as the Foundation decided on the 10 sites with which it would work over time, she thinks it was time to have a local presence.

This was particularly true in White Center, she thinks, because it was the most distant site from Baltimore and its Site Team Leader, Bob Giloth, was performing this role in five sites, more than anyone else. "He knew he couldn't do the level of work to get the initiative off the ground. So he went pretty quickly to a local coordinator."

Louisville STL **Sammy Moon** also thinks the need for a local coordinator became greater as the initiative entered new phases, saying that the initial, relationship-building, getting-to-know-the-community phase was do-able. "It was great meeting people, testing out the theory and talking to folks about what we could do together." But as the initiative entered its second phase, "You really had to have some sort of presence on the ground."

**N**ot being on the ground was Barbell's greatest challenge. "I didn't figure out how to overcome that challenge of being in Baltimore and being so disconnected for weeks at a time from the work that was going on. As much as I would read the *Des Moines Register* and stay in touch, you have no feel for what is happening in the community.

*"There is a palpable sense of what is happening that you pick up from people that informs how you think about and do the work. That was not there for me. It was very, very hard to pick that out and feel like you had enough of a sense of Des Moines and what was right for Des Moines. That is a real deficit to the STL role. I didn't overcome that."*

Initially Barbell hired someone who could perform administrative assistant type work, such as organizing meetings. But looking back, he realizes that he needed someone locally who could do more. *"I began to realize that I can't be effective from a distance and that we needed a different type of person on the ground."* He needed someone who could engage people and help manage the work. *"There are some developmental stages to this initiative that require some different kinds of skills."*

But Barbell also came to think that a person performing these roles should be chosen at least in part by local people. *"We might want to move this conversation very differently in the early stages, with the community taking some ownership and leadership around who is the right person to facilitate and bring people together and lead this work. That would have been a very different conversation and we would have made a very different decision early on."*

Hartford's site coordinator, **Ana-María García**, agrees. *"It would have been better to start with a local coordinator who knows the local landscape intimately and could apply Casey's resources and ideas in ways that made the most sense in the neighborhoods and with the local institutions."*

**A**nother reason García believes Making Connections should have hired a local person very early in the process is that most of the STLs, being senior foundation staff people, were extremely busy people.

*"Because the STLs had many responsibilities beyond the Making Connections sites, they had difficulty paying the amount of attention that*

*"I didn't figure out how to overcome that challenge of being in Baltimore and being so disconnected for weeks at a time from the work that was going on. As much as I would stay in touch, you have no feel for what is happening in the community."*

—Ira Barbell

*was needed to build working relationships and to bridge the work of the various local organizations whose work intersected the most with Making Connections.*

*"This part of the work is time intensive and it was tough for STLs to devote as much time as was needed, especially without having a local coordinator in place."*

García thinks that having a local person focusing on building local relationships while the national person focused on *"enlisting foundation resources to address local circumstances"* would have *"allowed Making Connections to gain more traction much sooner."*

She also cited another disadvantage of not have a local person on board from the beginning: the tendency of local people to see their work as being accountable only to the foundation. *"A few of our organizational partners wanted to continue this direct relationship with the foundation, which, in at least a couple cases, created some unnecessary complications and slowed our progress."*

Hartford's STL, **Debra Delgado**, did not agree with García, who she eventually hired to be this site's local coordinator. Initially, Hartford's coordination was handled by a staff person of the local United Way, not a consultant hired by the Casey Foundation. Delgado said that, early on, she *"relied heavily on local ambassadors"* to communicate and help establish Making Connections' ideas.



*"It's important not to think about this in contractual terms but rather in terms of partnerships with people who are willing to be ambassadors and champions for this work. This more accurately captures the essence of Making Connections."*

**I**ndianapolis' Site Team Leader, Donna Stark, agreed with Delgado about the need to start building in a coordinating role for a local partner. If she was to start over again, she says she would have considered a larger role for the Central Indiana Community Foundation

(CICF), which eventually did become this site's local manager.

Stark thinks that getting a local coordinator became so essential that some STLs may have hired someone too soon, before the local coordinator role became clear enough and thus the skills needed became apparent. *"There was something about not knowing the community well enough, and desperately*



Indianapolis site coordinator Lena Hackett thinks it may have made sense to start building the capacity of a local organization to manage *Making Connections* much earlier in the process.

***"Theoretically, having someone who has a national perspective and teaming that person up with a local person who has deep networks and knowledge is a smart plan."***

*—Gail Hayes*

*looking for the right person. Could a partner like CICF have been a better way to get things done that first year?"*

Building a relationship early on with a potential partner like CICF could also have allowed more time to build that partner's capacity to eventually lead *Making Connections*, Stark believes. *"If we had known that early on, we could have built capacity in that organization at a moment in time when it was natural to do that,"* says **Lena Hackett**, Indianapolis' local coordinator.

For most people, the ideal—an ideal that several sites seemed to achieve—was to build a team between the national Site Team Leader and a local site coordinator/liaison. As Atlanta's **Hayes** put it: *"Theoretically, having someone who has a national perspective and teaming that person up with a local person who has deep networks and knowledge is a smart plan."*

## The many and varied roles played by the Site Team Leaders

# 2

In explaining why they thought the Site Team Leader role made sense, the fact that most STLs played many roles is clear. The STLs and local coordinators were asked whether this was just too much for one person. They were also asked about which roles they think were the most important.

Most people said that the STL role was extremely demanding, especially for people who had many other pieces of work. But at the same time they thought that having one person who was ultimately responsible for the work in each site was essential to keep *Making Connections* accountable.

Two people thought the role was “do-able” early on but got more challenging as *Making Connections* grew in the sites.

Several people commented that the position was Site Team Leader, which assumed that the STLs would be able to lead a team of people to do the work in each site.

Denver’s site coordinator Susan Motika said that the STL role was a “*really intense and difficult job in the early years*. There were so many relationships to solidify and produce.”

Hartford’s coordinator Ana-María García said that, “*I do think it was too much to ask of people who had so much other work on their plates*.”

Oakland STL Bart Lubow said that, since “*this work is never done, of course it’s too much to ask of one person*.” But he added, “*Work like this is sort of like gas in the container. However big the container is, the gas will fill it*.”

This said, he did believe that, “*Ultimately it’s important to have someone who’s responsible.... I believe in leadership*.”

García’s Site Team Leader, Debra Delgado, thought that, “*In some ways, yes, it was too much to ask of one person*.” She agreed with the need to have one person who was the “*captain of the ship at each site*.” But she thinks that person “*had too many duties and responsibilities and too little clarity in terms of where we were taking the ship*.”

For Delgado, part of the challenge was the need for a STL to spend a lot of time in their sites, which meant a lot of travel. “*This work was high-level engagement work. The expectation was that the STL would have a high profile within the community. This meant being there consistently, being seen and being accessible to a broad range of constituents. At the same time, there were many demands coming out of the foundation*.”

Louisville STL Sammy Moon thinks that the first phase of *Making Connections*,

*“Since this work is never done, of course it’s too much to ask of one person. Work like this is sort of like gas in the container. However big the container is, the gas will fill it.”*

—Bart Lubow

which mainly involved learning about the communities and building relationships with potential partners, was “do-able.” But the role became “more difficult” in phase 2, which involved defining results and identifying strategies. At this point, “*you really had to have some sort of presence on the ground.*” STLs also just needed help as they were playing “more complex roles” as well as continuing to do their other foundation jobs. “*It was increasingly complex and stressful.*”

Moon says the work became even more complex in phase 3, “*when we got into the close-the-gap ideas, performance measures, population measures, cross-site surveys and a new accountability structure.*”

“*At that point, it was well beyond management from afar. So the Site Team Leader became less a manager and designer and much more a supporter for the local team.*”

Given the challenges of performing the STL role in one site, especially for people “who had so much other work on their plates,” the challenges of performing this role in multiple sites seemed overwhelming to most people.



Bob Giloth believes it was an advantage to lead several sites because “I didn’t fall in love with them.”

“I don’t know how anybody could expect somebody to manage three or four sites,” said Oakland’s Blackwell. Moon agrees, saying it “*was a strategic error to think you could do more than one or two. It was just too intense to do it well.*”

However, one of the STLs who initially managed five sites, Bob

***“The way you manage innovation and build projects is you start off and innovate, then you bring other people in. If you get stuck doing it as your little thing, that’s a problem.”***

**—Bob Giloth**

Giloth, didn’t think the job was too demanding. “*It’s true of anything. The way you manage innovation and build projects is you start off and innovate, then you bring other people in. If you get stuck doing it as your little thing, that’s a problem.*”

Giloth thinks that managing several sites had an advantage. “*The advantage was I didn’t fall in love with them.... If everybody had their own site, we never would have cut it down to 10 sites [initially there were 21] because everyone would judge their careers on how their site went. That didn’t bother me because I had multiple roles. My life wasn’t tied solely to Making Connections.*”

Giloth did add that the work “*burnt me out and it was tiring, all that kind of stuff.*”

## **The role of building site teams**

One other foundation staff person was the STL for several sites—**Garland Yates**. He was able to manage more than one site because he believed that the main task of the STL was to develop “high-performing teams.”

Atlanta’s Gail Hayes agrees: “*People have forgotten what the original construct was—that they put together a team. That team included a technical assistance person, an evaluation person, the Site Team Leader, a program assistant and a diarist.*”

Yates invested a lot in building teams of foundation staff people for each of his three sites, as well as teams of partners within each site. *"We had to support teams functioning on multiple levels."* Despite his extensive organizational development and facilitation experience, at the beginning of *Making Connections*, Yates took a week-long training in team building, a course he says he found very valuable.

Denver site coordinator Motika believes that it was the team Yates created very early on with her predecessor, Cec Ortiz, that allowed Denver to flourish. *"They were an indomitable team. He relied on her judgment, expertise and knowledge of the community and her assessment of people. They worked very effectively together."*

San Antonio's **Victor Azios** also saw the STL role as leading a team. *"There is a principle that IAF [Industrial Areas Foundation, an organizing network] uses on how you define a leader. It is somebody who can bring five people to a meeting. So the question is, could I bring five people together to talk about things that were important to them."*

But while the STL needed to get teams of people to take on aspects of the work, Azios agreed with the idea of holding one person accountable. *"The buck has to stop somewhere. If not, it becomes very fluid. You can keep passing accountability on up the line until it is so vague that it's the president of some foundation 2000 miles away who is accountable. You need a local person you can point to."*

Unfortunately, while some site teams functioned very well, others did not. **Giloth** said that the *"team idea never really worked very well."* Why not? *"Because there weren't enough people at Casey who were experienced to be on a team."* Plus, some people *"figured out how not to get pulled into the Making Connections sites."*

San Antonio's **Azios** said that, *"There was no formal way to ensure that these teams would stay connected. They didn't put infrastructure to support it. And the team they selected for San Anto-*

*"People have their own work and this was just layered on. Within a year, half the people on the site teams weren't showing up. Not that they didn't care, but their priorities were elsewhere. The coordination became a logistical nightmare."*

*—Ira Barbell*

*nio didn't have the variety of skill sets to allow us to deal with multiple issues.*

*"So I saw those teams dissolve pretty quickly. In two to three months, I was without a team. The foundation didn't anticipate how much infrastructure they would need. There wasn't a culture of teamwork at the foundation level."*

**Barbell** also thought the site teams didn't work very well. *"People have their own work and this was just layered on. Within a year, half the people weren't showing up. Not that they didn't care, but their priorities were elsewhere. The coordination became a logistical nightmare and just didn't work well."*

Looking back, Barbell believes that the STLs should have focused more on building teams of people from the sites. *"You really need to build the expertise locally. If a Casey person comes from Baltimore and meets with education people, they might have a great meeting. But then that person goes back to Baltimore. But if it's local, you have people who are more connected to the network. It's easier to further the conversation. That's the way it ought to go in future sites that do this stuff."*

Yates believes that both national and local teams were needed. *"The concept of having teams with many disciplines from the foundation was good. I couldn't have been the STL in three sites without a team of people helping me."*



*"But the silos got in the way. It was ironic. Even though people were encouraged to work in teams, they were held accountable for outcomes that were not consistent with what was evolving within that team."*

Yates believes the problem was that the STLs weren't *"given a mandate that put the STL in a real leadership position. In the absence of that, it made it difficult. You had to figure out how to make people feel committed to what you were doing. Fortunately I had good luck with that. I was able to get people on all three of my teams to take on pieces of work and to play specific strategic roles."*

For Yates, the challenge of building teams within the foundation suggested a broader problem. The foundation was asking its local partners to change the way they do business. But it was very challenging to change the way a large national foundation does its business. *"There wasn't a tearing down of the culture to create a more team-oriented culture."*

## The role of connecting the foundation and the sites

Of all the roles the Site Team Leaders played in *Making Connections*, most people think that the most critical one was to be the link between the foundation and the sites. Indeed, several people think that questions related to this connector role are critical to the ways that *Making Connections* developed over the years.

*"One of the most important things the STL did was essentially be the link between the site and the foundation,"* said Oakland STL **Bart Lubow**. *"I think that helped produce growing clarity about what the strategies were."*

*"The Site Team Leaders were the connection,"* states Atlanta's **Gail Hayes**.

Hartford site coordinator **Ana-María García** agrees, saying the connection to the foundation provided by the STL was "extremely important."

*"In the first two years we spent an inordinate amount of time reassuring the community that this foundation wouldn't play havoc and leave like the prior ones had.... It was important that we made personal commitments to the community to not do that."*

—Victor Azios

*"When I first came on staff, virtually all my ties to the foundation were through my STL."* Over time, after García's STL left this role, she came to realize *"just how helpful these relationships [with other foundation staff] are in getting things accomplished on the local front."*

In essence, the STL was the foundation's ambassador to the sites. Saying this role was very important, San Antonio STL **Victor Azios** explained that, *"People didn't know the Annie E. Casey Foundation. Some people knew it because of Kids' Count or they had heard the name on National Public Radio, but most didn't know it. So it was important to have someone informing and educating the community about the foundation and about Making Connections."*

It was also important to have someone who could reassure the community about the foundation's intentions, Azios believes. *"In the first two years we spent an inordinate amount of time reassuring the community that this foundation wouldn't play havoc and leave like the prior ones had.... It was important that we made personal commitments to the community to not do that."*

As *Making Connections* evolved, it was also important to have someone on the ground who could explain the changes, Azios thinks. *"I tried very hard to bring clarity to things the foundation spoke about. Sometimes they were very unclear"*

when I heard them at the foundation. But I tried to 'communitize' the language to make it more digestible for the community."

Several people spoke about the importance of this "translator" role, the word used by Louisville's **Sammy Moon**. "How do we all stay in synch on what is a pretty complicated initiative that we are undertaking here?" Moon thinks now that STLs could have performed this role better. "Try as best as you could, it didn't always feel like it was very transparent or as helpful as it could have been to local folks."

**T**he connector role always had two sides, according to nearly all the STLs. They saw the role as not just communicating the foundation's perspectives and expectations to the sites. It was also to communicate the site's perspectives to the foundation.

"Your ability to make the case for your site was huge," says Atlanta's Hayes. "If your site was doing good work but the STL couldn't articulate it, the site was in trouble. If it wasn't doing good work but the STL could tell a good story, it was in good shape. There were 22 sites at the beginning and [the foundation's leaders] couldn't visit them all. It was really important that the STL be able to communicate the site to them."

But it wasn't simply communicating what a site was doing. It was also communicating the site's perspectives about how the target neighborhoods could change, as well as finding ways to blend the site's perspectives and the foundation's ideas and expectations.

This conduit role is potentially one of the most powerful aspects of the STL role. STLs could link the ideas and resources of a national funder with the ideas, experiences and resources of local communities. Because the STLs had a connection to both the funder (as a senior staff person) and the local community (as the leader of a team of people who were building a local change process), they could potentially lessen the inevitable tensions that develop between the national and local levels.

*"Many STLs found ways to get their jobs done in spite of that tension between the foundation and local sites. They were adept at being transparent and saying this is the foundation's interest and still being able to elicit authentic feedback from people on the ground."*

—Fred Blackwell

But while this aspect of the STL role had great potential, it also carried great risk. For many, it was the most challenging aspect of the STL work. The questions about this part of the STL role stimulated some of the most intense and varied responses from people.

Oakland's Blackwell thought that conflict was inevitable for the STLs because they needed to "float between two worlds, to simultaneously represent the foundation and the community in a transparent, consistent way.

"There were too many bosses to answer to and too many conflicting agendas." He thinks this is why the STL role and the local site coordinator role had to be split.

Blackwell does believe that the most effective STLs "found ways to get their jobs done in spite of that tension between the foundation and local sites. They were adept at being transparent



Oakland site coordinator Fred Blackwell thinks that STLs had "too many conflicting agendas."



and saying this is the foundation's interest and still being able to elicit authentic feedback from people on the ground."

**M**oon questions whether the STLs did as good a job communicating their sites' perspectives to the foundation. *"I think we did a better job of translating what was coming out of the foundation to the sites than we did of bringing back [information] from the sites to the foundation."*

Part of the problem, believes Des Moines STL Barbell, is simply that there weren't good enough mechanisms to communicate what a STL in one site was learning to STLs in other sites. *"We needed to know what other people are learning from their sites."*

He says that the foundation tried to do this through monthly "joint ops" meetings, but too often presentations involved *"people putting their best foot forward,"* in part because there was an undercurrent of competition among the sites. *"I still can't tell you the strategies that played out in any of the other sites...."*

*"What's missing is on-the-ground experience. Probably every site has three or four things they did that worked beyond their*

*expectations."* Better understanding why these strategies were successful would allow an STL to *"lift up and demonstrate the underlying concept of Making Connections."*

However, Barbell thought that there was a very useful exchange among the STLs and Casey's senior vice president, Ralph



Des Moines STL Ira Barbell says, *"We needed to know what other people were learning from their sites."*

*"Early on, a small group of us used to have regular meetings with Ralph to probe and push issues—I found it intellectually stimulating and engaging. It pushed your thinking.... It was great—very collegial and challenging."*

—Ira Barbell

Smith. *"Early on, a small group of us used to have regular meetings with Ralph to probe and push issues—I found it intellectually stimulating and engaging. It pushed your thinking.... It was great—very collegial and challenging."*

Moon agreed that, *"We could have done a lot better"* connecting foundation staff people to the work in the sites. *"Early on we used to have meetings once a month where Site Team Leaders would come together, but it was really set up as more of a 'show and tell.' It wasn't a spirit of, 'Let's put our baggage on the table and talk about it and learn from it and share with each other.' It was more of, 'Let me tell you the wonderful thing that's going on in my site.'"*

*"What we came to learn over time is that a lot of good things were going on, but some of them were not quite as good as what was being reported."*

*"I think we could have early on created a very different environment so that we at the foundation could have learned a whole lot more, and could have shared with each other and learned from each other. I think we do it better now than we used to and it's still far from perfect."*

**A** few STLs and local coordinators believe that part of the problem was that, over time, the foundation became more directive about what the sites needed to be doing. The STLs' primary role became to communicate the foundation's evolving thinking and get the sites

to adopt it. Their role of helping the sites create their own approaches to implementing the foundation's ideas became less important.

One local coordinator says that this site's STL was very good at keeping the site aware of changes in the foundation's thinking, saying that the site's STL's *"ability to read the horizon in the foundation and understand its priorities and direction was always very acute and accurate."*

But this coordinator questions whether the STL *"was an advocate for the site."* While this STL felt that he/she was an advocate, the coordinator says that, *"I guess it's hard for me to see that."*

This issue of who and what was driving the evolution of *Making Connections* is one of the most controversial aspects of how this initiative developed over the years. The people interviewed for this reflection had very different perspectives on the source of the foundation's evolving ideas for *Making Connections* and on the role the STL should play in implementing the foundation's evolving ideas.

**A** few people thought that the STLs were foundation employees and thus their primary role was to represent the foundation, not their sites. *"You can pretend,"* said Lena Hackett, *"but ultimately Site Team Leaders are representatives of Casey."* This coordinator's STL—Donna Stark—agreed, saying that she had to be firm at times when it would have been much easier *"to sit in a room and soft pedal and say what people want to hear."*

Having an STL who knew what the foundation was thinking and could communicate that to her site was critical, Stark believes. *"Early on and up until about two years ago, the role of Site Team Leader in tracking changes and communicating back to sites shifts in direction from the Making Connections management team also was very important."*

*"In the absence of that intimacy [with the thinking of senior leadership of the Foundation]*

***"The ability to stay current on thinking, to communicate changes in and shifts in direction as a result of what we're learning, and being the communicator of that, are critical."***

***—Donna Stark***

*everything would have felt very abrupt. The intimacy of the Site Team Leader with the initiative management team gave us a level of understanding of what they were thinking before they acted."*

Stark's ability to communicate the thinking and learning that drove changes in the *Making Connections'* approach helped keep the local work on track, Hackett believes. In places without a hands-on site team leader, these shifts in direction were sometimes cast as the whims of the foundation's senior leadership. *"The ability to stay current on thinking, to communicate changes in and shifts in direction as a result of what we're learning, and being the communicator of that, is critical."*

This ability was especially critical as *Making Connections* moved from one phase to another, Stark believes. When the initiative moved from its early emphasis on relationship building to a harder focus on results, for example, site team leaders were challenged *"to manage transitions of strategies, ideas and partnerships, to knowing where we were and having a vision of where we need to go and to see a pathway for getting from one place to another."*

Stark believes that some STLs took the position that the results focus "came out of the blue" and was counter to the initiative's values around resident engagement and leadership. Although Stark disagrees with this view, saying that the results focus was always part of the initiative, even if this were a com-

pletely new emphasis, she believes that STLs still had a responsibility to help local partners make the adjustment and lead a new phase of work.

**S**usan Motika, Denver's local site coordinator, has a different view of the STLs' role. She argues that her site's STL, Garland Yates, played an essential role as an advocate for Denver, a role she thinks may have been the most important reason that *Making Connections* has long had "a strong foundation" in Denver.

*"Garland was very protective of our city. Garland was on the alert for what made sense for Denver. He was on the alert for what opportunities made sense. He was also vigilant about saying 'No' to the foundation and pushing back and saying, 'This is not a good opportunity; this is not a good requirement....'*

*"If that kind of strength and balancing act was not well executed by him in those early years, Denver could have gotten mired in other work that would have distracted us from forming our own way of doing business.*

*"We have solidified and made permanent our way of doing business here. We are stronger because we have a moral compass. We have a foundation. And that foundation was being built in the early years.*



Denver site coordinator Susan Motika believes, "You need a STL to have your back."

*"And without Garland's protectiveness and advocacy for our city, we would not have been able to build that foundation.*

*"You need a Site Team Leader to have your back, someone who is willing to say, 'No, this is not appropriate and here's why.'"*

*"I never thought that my sites had any veto power over what could or could not be done locally. I saw my role as finding the common interests between the foundation and the sites."*

—Garland Yates

**Y**ates himself thinks that the idea that a few STLs advocated too strongly for their site's interests, putting them above the foundation's, reflects a misunderstanding of the role STLs like him tried to play in representing the interests of both their sites and the foundation.

*"What you have to do as a STL is to get people to respond to what the foundation is requesting. The key is striking the balance of doing a reasonable amount of responding while also continuing to pursue the site's own notion of what the work is about."*

*"I never thought that my sites had any veto power over what could or could not be done locally. I saw my role as finding the common interests between the foundation and the sites."*

He thinks that disagreements between sites and the foundation are inevitable and not unhealthy. *"When you come to a place and say you want to partner with them, you are giving them permission to disagree with some of the things you want to do. You can't get defensive when they express that disagreement.*

*"The idea was to build momentum for Making Connections' ideas locally. Local people needed the space to build that momentum. They needed to find ways to act on the foundation's ideas in ways that made sense locally and met the interests of local people and organizations.*

*"The genius of how the foundation began Making Connections was that it allowed the space*



for local people to act on the foundation's ideas in ways that made sense locally. That's ultimately how you build something that will be sustained.

*"The most gratifying thing about having been involved in Denver is that there are core aspects of Making Connections that have transformed how people work in this city and thus will be sustained whether or not Making Connections continues after the foundation cuts back its funding. That's a significant accomplishment."*

**O**ne point of agreement is that the relationships that the STLs developed in their sites were invaluable as the inevitable tensions developed between a national funder and local sites.

Oakland STL **Bart Lubow** said that the STL's relationship with his or her site *"helped mitigate a challenging set of dynamics as the foundation thought its way through the initiative."* The changes in the foundation's thinking *"set up a series of tensions that were in conflict with some of the supposedly core values of the initiative. Those things needed to be smoothed over."*

*"The most obvious example was when the results framework was first introduced and, all of a sudden, sites were told, 'These are going to be the results.'"*

*"It was like, 'Why didn't you tell us that two and a half years ago?' I think the STL's relationship to the site was very important in that regard."*

Oakland's local coordinator, **Fred Blackwell**, agreed about the importance of the relationships. *"I was surprised the foundation's credibility wasn't more damaged than it was when that transition happened [to six specific results, later reduced to three]. I could have easily seen communities being really frustrated with that. Bart and I conveyed it to the community as soon as we saw it coming."*

San Antonio STL **Victor Azios** also thinks the relationships the STLs built in their sites helped prevent *"a lot of fires and clashes at the local level that would have created time-consum-*

***"The genius of how the foundation began Making Connections was that it allowed the space for local people to build momentum around the ideas locally. That's ultimately how you build something that will be sustained."***

**—Garland Yates**

*ing bad feelings between the community and the foundation. Having a local person helped resolve a lot of the problems that were often driven by miscommunication or lack of information."*

Louisville STL **Sammy Moon** also believes that the relationship between the sites and their STLs helped *"overcome tensions that may have been inevitable."*

*"The work is so relationship-based that if you had a good solid relationship as a Site Team Leader with local folks—even when the foundation seemed to stumble and people would be scratching their heads going, 'Where did that come from?'—you could get through that, though frankly, it wasn't always easy. What I try to do consistently is be the 'heads-up' person: 'Start thinking about this because I think it's coming.'"*

Des Moines STL **Ira Barbell** thinks that the tension that did exist was actually positive. *"You absolutely want people to argue over ownership and who should lead this. It was a healthy sign that they wanted to take ownership. That's why I'm pretty optimistic."*

But during the years he was the STL in Des Moines, Barbell doesn't think there was that much tension. *"We had some tension, but it was more over reports and frequency,"* as well as the delays in getting grant money from Baltimore to Des Moines. He doesn't think the tension that did exist *"interfered with the desire of the site to maintain the relationship. There was a very*

*positive respect and feeling for Casey.... There was a very high value put on the foundation's engagement in this work."*

Dealing with the tension over issues such as money getting released on time was one of the valuable roles several STLs played, according to Motika. *"Trouble-shooting and problem-solving were essential. Being a large organization, the Casey Foundation has many pockets of accountability and requirements. Having someone who could assist our site in cutting the red tape quickly was essential."*

Several people mentioned one particular point of frustration in the relationship between the foundation and the sites: the number of foundation staff and consultants who were coming to the sites.

*"The big problem in the early years," said Seattle/White Center STL Bob Giloth, "was traffic control. There were so many Casey people trying to come in to be helpful. But often they were really trying to run their own portfolios. And I tended to keep them out because they were very disruptive in some ways."*

San Antonio's Azios echoed this concern, saying that *"one of my biggest disappointments was how non-collaborative the foundation staff were."* He said that several foundation people *"felt perfectly comfortable bypassing the Site Team Leader"* and making direct contact with people in Azios's site.

*"I can't measure the amount of confusion, ill will and distractions this caused in the initial three or four years."* He added that this problem improved in later years.

## The role of evaluating their sites

The Site Team Leaders played a critical role in evaluating their own sites to determine which ones would continue when the number of sites was in essence cut in half. The STLs and local coordinators were asked whether it made sense

*"You absolutely want that to happen. You want people to argue over ownership and who should lead this. It was a healthy sign that they wanted to take ownership. That's why I'm pretty optimistic."*

—Ira Barbell

for the STLs to be primarily responsible for this evaluation.

From the beginning, the Casey Foundation assumed that not all of the initial 21 sites would continue as full *Making Connections* sites. In some sites, the core *Making Connections* ideas simply wouldn't find resonance. In other sites, the foundation would find that there wasn't enough capacity to carry out such an ambitious, long-term initiative.

To make decisions about which sites should continue, a team of Casey staff led by the Site Team Leader would come up with a recommendation for their site(s). These recommendations were then reviewed by senior foundation staff, who ultimately made the decisions.

Initially the foundation chose five sites to move on to the second phase and another five that needed to spend a year getting to the point where they were ready to move on. All five eventually did move to Phase 2. The other 11 cities became "strategic investment sites," with the foundation supporting specific pieces of local work.

Many think this process worked very well in selecting the sites that had embraced the core ideas of *Making Connections* and that had the most potential for success. Others are less certain.

*"I don't think there was anybody in a better place to do the evaluation that the STLs," said Atlanta and White Center's Gail Hayes. "They were spending the most time there."*

Bob Giloth, STL for five sites, said that he *"didn't have a problem"* with Site Team Leaders playing a critical role in evaluating their own sites. *"I recommended some sites not to go forward. For two or three years we had to make presentations internally about progress. So it wasn't like you were making [the decisions] in a vacuum. You got feedback and [people] could tell if you weren't making progress. You'd hear that from the vice-president you were working for."*

However, later in his interview, Giloth was less certain about how well the evaluation process worked in other sites. He says he thinks the foundation could have *"done a better job of picking sites."* He also thinks that this evaluation process should have been ongoing, with sites falling out over time as their progress slowed down.

**A** few people questioned how honest the presentations that STLs made about their sites during the initial couple of years really were, a result of the competition that many STLs perceived.



San Antonio STL Victor Azios says that *"having a local person helped resolve a lot of the problems that were driven by miscommunication."*

*There was a built-in motivation to make your site look good,"* thinks Oakland STL Bart Lubow. *"The way this all felt when you were back here in Baltimore was that your site was in part a function of your skills and performance...."*

*"One of the problems,"* Lubow adds,

***"There was a built-in motivation to make your site look good."***

***The way this all felt when you were back here in Baltimore was that your site was in part a function of your skills and performance."***

***—Bart Lubow***

*"was the STL could say anything back here in Baltimore that had nothing to do with Oakland and who would be the wiser?"*

Denver's Yates believes that, *"In the culture of competition that emerges, teams compete with one another for recognition.... You put people in a situation where their candor and honesty might give way to self-preservation. Then you have a mess."*

*"The choices you [the foundation's senior managers] have to make are just guesses. You are making decisions based on factors that have little to do with the potential of the site...."*

Giloth agreed that, *"In the early days we were all pretty competitive."* This competition sometimes worked against honest assessment of where a site was, Moon said. *"There wasn't a spirit of, 'Let's put our baggage on the table and talk about it and learn from it and share with each other.'"*

Oakland's Blackwell said that he and STL Bart Lubow tried *"to present a somewhat unfiltered look at what was going on in Oakland."* But, he adds, *"after reading some of the other site team reports, it was clear to me that wasn't how everybody was reporting their work. There was a lot of grade inflation, painting rosier pictures of the work than was actually so."*

But Blackwell sees the other side as well. *"Who better to do this than the folks who were*



*doing the work? I can't point to an alternative that would have worked out any better. Evaluating your own work is hard."*

Barbell doesn't think the evaluation process worked well, but for a different reason. "As you get engaged in the work and if you truly engage in a deep way with the work, it's hard to separate. Trying to build these relationships and trust with these people—that requires a personal investment and commitment. You can't engage and mobilize from a distance.

"This leads you to a conflict about evaluating your own role. We all have large blind spots. We need to get feedback from others in the community, and we need someone external to debrief and learn."

Barbell thinks it would have been better to have someone else early in the process whose main role was evaluation.

Even without the undercurrent of competition, Yates thinks that it is still hard for someone who lives thousands of miles away from a site to really know what is happening in that site.

"If you're not there continuously, if you just come in periodically and spend a couple of days, you don't get a sense of the reality. People are always going to put on a dog-and-pony show. We didn't know how to unwrap it."

What would have helped, Yates thinks, is to "have had clear mandates, a set of benchmarks,

***"Who better to do this [site evaluation] than the folks who were doing the work?"***

***I can't point to an alternative that would have worked out any better. Evaluating your own work is hard."***

***—Fred Blackwell***

in terms of the work that it took to build the teams, to develop the strategy and to make the foundation a player in the local community." He thinks "this part of the work was underappreciated." As a result, it was hard for STLs to "judge how they were doing. You were out there by yourself." Without benchmarks, all the work that Yates did to encourage people to get engaged in *Making Connections* and "to keep going and learning" didn't get recognized.

Complicating the evaluation task, a few people said, was the reality that the teams of Casey staff and consultants who were expected to help the STL in each site—teams that included an evaluator—often didn't function particularly well in some of the sites. As a result, only the STL had much direct exposure to some sites.

# What does it take to do this work well?

## The skills and experiences of the Site Team Leaders

# 3

**G**iven the range of roles and responsibilities that Site Team Leaders had, those who did this work well brought considerable skills and experience to this job. All of them were senior-level staff people. Many had worked on other national initiatives. Most had worked for several years with the Casey Foundation.

However, because the foundation decided to start *Making Connections* by using existing staff, the STLs came to this work with an extremely varied set of skills and backgrounds. The STLs were asked a series of questions about what it takes to do this work well: What abilities do people need? What do they need to know? Do they need to have certain experiences, such as experience building coalitions?

They were also asked about what training may have been useful.

And they were asked what they thought about the fact that the STLs brought such a diverse set of skills and experiences to this work. Did that make sense? Did STLs with particular sets of skills and experiences do better than those who brought other skills and experiences? People had a lot to say in response to these questions.

### Which skills and experiences are essential?

While individuals emphasized different sets of skills, the bottom line is that the Site Team Leader job was not easy, requiring the kind of experience and expertise that takes years to acquire, as well as a range of people skills and strategic abilities that not everyone possesses.

Hartford's García offered a good summary of the range of skills needed: *"The STLs have to be*

*good information gatherers, listeners and collaboration builders. They need to be able to work across different sectors. Their ability to strategize is critical. STLs also definitely need to be able to relate with all kinds people and to have a passion for community building, along with a strong and very serious commitment to addressing the issue of poverty."*

Several people talked about what is probably one of the most obvious needs for an initiative like *Making Connections*: the ability to get people to work together over time. **Blackwell** says a good STL needs an ability *"to pull people together, to articulate a vision and get people to buy into that vision."*

**Hayes** says that STLs *"have to be able to build a team,"* adding that this was the weakness of some STLs and site coordinators. But it's not just any coalition-building experience, Hayes believes. *"I think it should be a requirement that people have worked on initiatives, not just programs. All programmatic experience is almost a negative. They need experience in bigger*

***"The STLs have to be good information gatherers, listeners and collaboration builders. They need to be able to work across different sectors. Their ability to strategize is critical. STLs also definitely need to be able to relate with all kinds people and to have a passion for community building."***

**—Ana-María García**

city, county or statewide initiatives. They need experience in partnership development."

Barbell emphasized the skills that underlie successful coalition building. "You've got to be able to build trusting relationships with people. That's at the heart of this. You can get in the door with the Casey reputation, but you've really got to be able to establish relationships and build trust because you've got to be able to push people to where they are a little outside of their comfort zones."

That won't happen immediately, Barbell thinks. "You've got to be able to engage people in difficult conversations and keep them at the table. You've got to have the ability to work with very different sets of individuals: people from government, business, neighborhoods, nonprofits."

These people have very different "styles," Barbell believes. As a result, you need to have experience working with people from all of these sectors "so you'll know enough about how they think about this set of issues."

Indianapolis coordinator **Hackett** also emphasized the skill of being able to work with—and listen to—people who are different. "Valuing what communities know and valuing their way of getting work done is the highest characteristic for a Site Team Leader."

She thinks this comes from "open mindedness, flexibility and being able to listen...."

Indianapolis STL **Stark** agrees with "this notion of openness, of not being an ideologue" and having a willingness to "learn from folks in the community."

**Lubow** said something similar, saying that people



Indianapolis STL **Donna Stark** believes STLs needed to be open and not be "ideologues."

**"This is tough work. It's like pushing a rock up a hill. That means you have to have a certain amount of belief that positive change can occur and a passion that everybody around the STL can feel so they jump on board."**

—Fred Blackwell

must have the ability "to relate to people who are very different from them, and to think about things in environments that are typically different than the environments they are used to."

**S**TLs also have to have "the passion for the kind of work they were being asked to do," Blackwell thinks.

"This is tough work. It's like pushing a rock up a hill. Turning communities around and making systems more responsive to children and families are things that haven't been accomplished anywhere. That means you have to have a certain amount of belief that positive change can occur and a passion that everybody around them can feel and see so they jump on board. That's what was missing in some of the STLs."

"It wasn't a skills thing. Some folks just fundamentally didn't believe this was going to work. If you fundamentally don't believe something is going to work, it's hard to get up in the morning and go do it and travel around the country and spend time away from your family in order to make it work. I think that was one of the more significant challenges in terms how this thing was staffed."

Denver coordinator **Motika** agreed with Blackwell, saying that "an unshakeable belief is essential."

Barbell put it this way: "There a set of principles and values that drive the work. This person has to have them."

**S**everal people cited the need for *“experience in community change work,”* in the words of one coordinator.

*“The foundation should have had people who knew the whole process and concept of community change,”* says Azios. *“With more people who had this knowledge, I think we could have done twice the work in half the time. Too many people were trying to learn as we were doing the work.”*

While Azios had 30 years of community experience, he felt a need to learn about starting movements. *“When Ralph Smith asked me to come to work at the foundation, he said this initiative was supposed to start a movement. I reflected on people who’d started movements. I thought the people I wanted to learn something about were Mother Teresa, Cesar Chavez, Emiliano Zapata and Mahatma Ghandi. Reading about them framed my approach.”*

That approach involved what Azios calls *“servant leadership.”* *“What needs to drive the work is what the people say they want. You become an instrument of change for the people.”*

One STL—Donna Stark—acknowledged a need to learn more about community change. *“I do well in the engagement and enrollment work, sharing an idea, sweeping folks into the idea, bringing partners to the table. The things I did less well were trusting and believing the role residents can play in this initiative....”*

*“I did not come in with the perception that residents knew as much as Casey did on sustainability and the work. I got better with it, with believing that.”*

Stark also came to better understand the dynamics at play in isolated neighborhoods. *“I underestimated local tensions between residents in a single neighborhood. I could not imagine that [one neighborhood] would be so divisive or that [another neighborhood] could have one person who so dominated the landscape that she prevented us from going deep.”*

*“The foundation should have had people who knew the whole process and concept of community change. With more people who had this knowledge, I think we could have done twice the work in half the time.”*

—Victor Azios

**Y**ates emphasized the skill needed to recognize and work with underlying tensions like these as well as the skill to bring together a broad range of people and organizations to start a community change process.

*“This goes back to the importance of understanding group dynamics and organizational development. You can bet that, if you are trying to bring a group of people together around resource allocation, that people come to it with beneath-the-surface ideas. They have their own ideas and notions about how to do something. They see this as an opportunity to put that into play.”*

The key is the ability to be as clear as possible about what resources you are bringing and how those resources will be allocated. *“If you start by being vague and overly controlling, you create a dynamic within the site where you have to keep dealing with those things. They keep coming up. And sooner or later they cause a rupture in the group.”*

The ability to be clear about tough issues is part of the skill set a person needs to build a team, Yates believes. He says that not being clear can undermine a team over time. *“Those things can be hard to overcome, especially when you understand how distrustful many residents are about these kinds of initiatives. You can set a bad course. People don’t necessarily leave. But they come for different reasons. They aren’t pulled into what you are trying to do. They just see you as a*



grantmaker and they see their participation as an opportunity to get a grant.

*"If you are uncomfortable with making decisions openly and being accountable to those decisions, you can have a whole bunch of challenges trying to be a site team leader."*

**A**nother skill critical in building diverse teams is cultural understanding, Hayes believes.

*"Theresa Fujiwara [Seattle/White Center's local coordinator] is just the right person in Seattle because she sees everything through a cultural lens. In White Center, you need that deep sense of culture to make it work. You need to love that there are 27 languages and cultures. Theresa is well respected and highly regarded around the city. She loves White Center and its rich diversity. She did the right leg work to connect with the right people when she first got started."*

Hayes also emphasizes the strategic thinking that underlies the work. *"Some of the strongest people in the network have worked with mayors, where they have done a lot of strategic planning."*



White Center site coordinator Theresa Fujiwara was "the right person in Seattle because she sees everything through a cultural lens," says Gail Hayes.

The work also requires great flexibility, she thinks. *"It requires the kind of personality type who is able to work on multiple fronts."*

The bottom line is that bringing a diverse group of people together and building a long-term change process is extremely demanding work that takes significant skills. Hayes says that people must have *"a deep appreciation for how hard*

*"People must have a deep appreciation for how hard this work is. This work is not linear; it is spiral. You need to be ready for messy. If you didn't like messy, you would run out the door."*

—Gail Hayes

*this work is. This work is not linear; it is spiral. You need to be ready for messy. If you didn't like messy, you would run out the door."*

**A** few people emphasized the ability to trust not just residents but the entire process, and to be patient. *"I was very impatient,"* remembers Donna Stark. *"I would ask myself, 'Why was it taking so long?'"* Stark's site coordinator *"made me learn patience. I was not excited about learning that."*

Stark also learned the importance of trust. Her initial "inclination" was to control. *"If I could control, there would be success. I had to learn to build relationships and share control."*

*"At first it was finding the right person [to be the local coordinator] and then building a relationship over time that felt like we are in this together and that success belongs to both of us, trusting [the coordinator's] commitment to that. It was letting go of control and building a trusting relationship when your reputation is on the line."*

Giloth also talked about the need to be able to *"share leadership and give up power, while at the same time knowing how to focus and get things done."*

But you can't always be patient, Hayes warns. She says that you also have to *"be tough in this process,"* demanding that your partners have the needed tracking systems to produce quantifiable results. When a partner doesn't

produce this, *"You have to hear them, but stress that you need data to tell a story. That is the results aspect of this work. You have to have an appetite and a bias for data."*

**B**arbell has a very different perspective on the skills and experience required for this role. He thinks the key is that STLs have experience and expertise, which is why having senior people in this role was critical.

*"You don't need to know everything, but you have to bring a level of expertise and you must have done this kind of work. You have to have something to draw on and talk about your experiences."* This gives you credibility, he thinks, which is essential.

*"What I found is it doesn't matter what I've done in the past.... There's a core set of ideas that underpin how you work with people and systems. They are not fundamentally different."*

*"I found that I could draw on a set of skills and learning to move in the right direction with most of the strategies and discussions we had. That's a core learning. There are an underlying set of principles, values and tactics that underpin this work. Whether you're working on organizing, state government or the legislature."*

*"I may not have a strong background in community organizing and resident engagement. So I used Garland as a personal advisor to bounce ideas off."*

Barbell also said that the skills of bringing people together and engaging and organizing residents need to be balanced with the skills of knowing how to turn all this into concrete policy changes. *"STLs needed to understand how we engage the political infrastructure to make a case to change public policy. We need to understand policy.... It requires a set of political sensibilities."*

Yates also talked about the value of having considerable experience. *"I was just about old enough so that people thought I knew something. That proved to be important time and time again."*

***"You have to hear your partners, but stress that you need data to tell a story. That is the results aspect of this work. You have to have an appetite and a bias for data."***

***—Gail Hayes***

*Just being a seasoned person in dealing with people and organizations was really helpful.*

*"Being older and seasoned prepared me to work with people with conflicting agendas and people used to working in environments that are not about collaboration and alliance-building. It would be very hard for someone who was young and inexperienced to play this role."*

## **What training was needed?**

One of the points of agreement among nearly all the people interviewed is the need for more training. Hartford's **García** spoke for several people in saying that, while she liked the fact that the STLs had different backgrounds, *"With the wisdom of hindsight, this perspective could have been enhanced if they received some common training upfront, something like a Making Connections management course."*

What would such a course have included? Most people didn't offer a lot of specifics, probably because the type of training is implied in the skills they think are essential for an STL. In other words, if you think the ability to build coalitions is essential, the training would be in coalition-building skills.

A few thought the problem was that there wasn't enough clarity about *Making Connections* at the outset, thus it was impossible to say what training was needed. Oakland's Lubow makes



this point. *"The problem was that there wasn't a known skills set or a set of tasks. Thus there wasn't a set of clearly defined competencies that people could then work on developing. Everybody here was smart enough to get it, but it was hard to get. It wasn't articulated."*

Among those who did specify the type of training, there was a clear division between a few who emphasized management skills and others who emphasized broader, working-in-a-neighborhood, building-a-team or sparking-a-movement type skills.

Delgado emphasized the need for training in specific management skills based on "more clarification around the job description and the resources that would be available to us." She wanted training in things like who could be hired, whether an office could be opened, how decisions were going to be made within the foundation. *"If all these things were in place and clearly articulated, then the foundation could have supplied training that flowed from the job descriptions and the job requirements."*

**Y**ates makes the argument for more training early-on around a broader set of skills.



Louisville STL Sammy Moon thought the varied backgrounds of the STLs "brought a diversity of opinion and perspective."

*"What the foundation didn't do—and I think this was a strategic mistake—is provide any training or skill-building. We were all being asked to do neighborhood-focused community-building work, but we had people coming from all different perspectives."*

*"There was never any intensive training around things like, 'This is what it's*

***"What I found is it doesn't matter what I've done in the past.***

***There's a core set of ideas that underpin how you work with people and systems. They are not fundamentally different."***

***—Ira Barbell***

*going to mean for you to take on this role. This is what it's going to mean when you start interacting with neighborhood residents as well as political and institutional stakeholders. This is what the political dynamics are likely to be when you get into neighborhood-focused work. Here's what it means to work with community organizations to accomplish what we're trying to do. Here's what it means to put an effective collaboration together.'*

*"People were thrown into this work with all these various perspectives without any kind of coordinated framing. So consequently you had some people who took to it and did really well and you had some people who struggled and couldn't figure out how this work was different from what they'd been doing."*

Moon also called it a "strategic mistake" not to do more training early on so that all the STLs had the skills and knowledge they needed to be effective.

**B**arbell believes the opportunity to get training was always there but that *"no one has the time to go away for training in some area that you may only be using for a short period of time."*

He adds that, *"What worked for me was to find people I had some confidence in who had experience in some area where I had questions and then work one-on-one with them to test my perceptions."*

One person who helped him in this way was Yates. *"I'd go in and ask him to help me understand the kind of language people were using.... Garland would say, 'This is what they're talking about.' He could help translate what others meant. That helped me gain a deeper understanding to frame those areas where we had common ground to move forward."*

*"It wasn't him telling me how to do community organizing. He helped deepen my understanding of the language, the components, what others have done in other places and how to use that in my engagements with other people."* Interestingly, one of the sites that has worked with organizing groups in achieving significant successes (in predatory lending and medical debt) was Des Moines, Barbell's site.

**H**ayes had a different view of the training that was needed, emphasizing the needs of people involved in *Making Connections* very early but who weren't long-time Casey Foundation staff people, especially the local site coordinators.

*"We should have done a better job of introducing people to the breadth and depth of Casey, including the Casey culture."* She adds, however, that there is only so much that formal training can do in teaching an organization's culture. *"Sometimes I think you can only learn it by going up there and spending time with people in the foundation.... It is all about building relationship with people and that takes time."*

### **Did it make sense to have people with very different skills and experiences perform this role? Why or why not?**

The contrasting perspectives among the STLs about the need for training—some wanting broad training in skills that would allow them to better facilitate a community change process, others wanting training focused on specific tasks that were involved in the STL role—suggests the

***"We were given a lot of flexibility to experiment and try what we wanted. No model was put in place, so there was a lot of flexibility. I found that to be a good way to start something like this when no one really knows what the best way is."***

*—Ira Barbell*

range of skill sets and perspectives in the STLs. One question that stimulated the most responses was whether this diversity made sense.

There were generally two strong views. Most people agreed that the benefits of having senior foundation staff people—with their connections within the foundation and their understanding of the initiative—outweighed the disadvantage of having people with such a range of skills and background. If anything, they see this range as a positive thing.

Others saw it quite differently: they believe that this work requires certain skills that many STLs didn't have. Indeed, the differences in the responses to this question suggests fundamental differences in people's views about what it takes to catalyze a change process in a local community.

**M**any people saw the diversity in the STLs as *"a very interesting experiment"* in the words of White Center's Theresa Fujiwara. *"Every Site Team Leader really did have a distinct point of view."*

*"In terms of evaluation, what impact did the differences among the Site Team Leaders have on the success of the initiative in their sites?"*

Oakland site coordinator **Fred Blackwell** also thought it made sense *"to have people with*

different skills because communities come at this stuff from different angles.” The result was a wide variety of approaches to implementing *Making Connections*. “You can see the difference in how the sites are implementing *Making Connections* based on people’s fundamental assumptions on how you get the work done.”

“I think it’s fine to have different people from different backgrounds and experiences,” said Louisville’s **Sammy Moon**. “It brings a diversity of opinion and perspective. It doesn’t put everybody in the same box. It’s not limiting and it opens it up.”

Des Moines STL **Ira Barbell** emphasized how the use of STLs with varied experiences reflected a critical aspect of how *Making Connections* started, which was the rare opportunity to experiment. “We were given a lot of flexibility to experiment and try what we wanted. No model was put in place, so there was a lot of flexibility. I found that to be a good way to put something like this into place when no one really knows what the best way to do it is.”

**Debra Delgado** thought that, “The different skills and experiences added to the cross-site learning process by accelerating everyone’s learning.” She added later, “Because there was no cookie-cutter approach, each STL could work from their strengths and learn from their colleagues.”

Atlanta’s **Gail Hayes**, who provided technical assistance in the early days of the White Center *Making Connections* site, also thinks that the variety was mostly a good thing. “They were each very different, which could be a plus or a minus.” If there was a good match between the STL and the site, then it was a plus, Hayes said.

“Their biases and expertise showed up in the sites. With Ira [Barbell] and Donna [Stark], you had lots of agency system partners early on.” She noted that, “Garland [Yates] involved organizers early in his work.” Bob Giloth “focused on workforce.” She says that, “My bias is towards partnerships, so that has been my focus.”

She thinks that the foundation “did a good job of choosing people who had a center of

*“The different skills and experiences added to the cross-site learning process by accelerating everyone’s learning. Because there was no cookie-cutter approach, each STL could work from their strengths and learn from their colleagues.”*

—Debra Delgado

strength” that could become “a *Making Connections* strength.”

**Barbell** also noted how the differences in skills and experiences among the STLs greatly influenced their approaches to implementing *Making Connections*. “I’ll use Garland and myself as polar opposites, with expertise in different areas. Mine is from government and bureaucracy and political systems. I have a comfort in working with traditional leadership. Garland’s comfort is in working at the neighborhood level in engaging people, primarily with organizing. It’s not surprising that Des Moines and Denver started this in very different ways.”

Overall this is a good thing, Barbell thinks. “It’s good for a foundation that is testing a set of ideas and new approaches. We didn’t know if there was a better way of doing this.... It was a very positive learning opportunity.”

**H**owever, this diversity also “had some down sides,” Barbell added. Several people also commented on these down sides, with a couple believing that the foundation’s early decision to rely on existing staff with such a range of skills was a “critical flaw” in *Making Connections*.

Delgado was one who liked the use of staff with diverse skills but who also saw that it “played to some of our weaknesses.”



San Antonio's Azios is much more critical. "Too many of the Site Team Leaders lacked community experience." He says they were "clearly intelligent people with a skill set." But their skills were more focused on policy and broad system reform. "The more I heard them speak, the more I realized that they hadn't done the time in the community."

Azios actually thinks that there really wasn't much diversity in those who were Site Team Leaders. "There was definitely a skew in the direction of people who had done broad-based system reform, with only a very small number of people who'd actually done most of their work in communities. We could count on one hand the people who brought that skill to the table. People who had done it in the field for awhile. You can't just read a book on assets or community building and go from there."

Giloth agrees with at least some of Azios' concerns. "The problem was that the national staff were of unequal experience in community development and unequal experience in putting together a new kind of strategy involving lots of different stakeholders and a certain amount of confusion and chaos. Not everybody was up for that job."

Interestingly, of all the various skills that STLs brought to this work, Giloth—whose expertise is in economic issues such as jobs—thinks that, "the level of experience working on the ground in communities is probably the more important consideration."

The fact that people brought different skills, experiences and perspectives to this role reflected the initial open-ended design of *Making Connections*, Giloth thinks. So your



Hartford STL Debra Delgado said that the diversity of the STLs' experiences was good but also "played to some of our weaknesses."

***"There was definitely a skew in the direction of people who had done broad-based system reform, with only a very small number of people who'd actually done most of their work in communities."***

***—Victor Azios***

answer to whether this diversity was positive reflects how you think about the initiative being so open-ended. Giloth says that he has had different opinions on this question.

"There's a certain genius to being that open-ended. When you come in as a national foundation, everybody wants to just take your money. They want to pick your pockets and say, 'We can do that. We can do that.' And that typically chokes out innovation and resident engagement. So I think being open was good."

"The problem was it took several years to focus programmatically on a group of families and having a result. You spend a lot of time undoing. You're constantly undoing what you've done in the past."

**A**nother STL—Donna Stark—agrees with a lot of what Azios and Giloth said. She thinks that having senior foundation staff be STLs made a lot of sense because they could communicate the initiative's ideas, help broker technical assistance and other resources, and underscore the foundation's commitment to *Making Connections*.

But the fact that these senior staff people had deep experience and national reputations in their areas of expertise didn't guarantee success in this new role as an STL. "The Foundation was naïve in thinking that, just because we are Foundation employees and are talented in other content areas, we all could be a good Site Team



*Leader. One of the lessons is that that is not true. There are characteristics of Site Team Leaders and skills to the role that need to be attended to."*

Stark acknowledged that, *"I did not know all that much about community building."* The key is that people be able to acknowledge what they didn't know. *"I didn't know about resident engagement and resident leadership, but I learned a lot from colleagues who did."*

The other side of the coin, Stark points out, is that because she didn't have a long history of working in communities, she was not wedded to a particular approach or ideology about how to do this work. *"I didn't believe that the only way to do this work was through a particular lens."*

Oakland's **Bart Lubow** agrees with Stark about the STLs' programmatic knowledge not being very useful. *"My justice reform expertise was not an advantage. This was not a situation where a diversification of skills meant that we were greater than the sum of the parts."*

*"Presumably the advantages were that people relied on their varied strengths. The disadvantages were that we had a lot of people who had no experience in community organizing, community development or any of those things to lead a rather vaguely defined process."*

**Y**ates calls the fact that many STLs had mostly programmatic skills *"a big drawback."* And he thinks that an understanding of how to work effectively in communities was just one of the skills that some STLs didn't possess. Just as important was the ability to facilitate *"interaction among such diverse groups of stakeholders."*

*"It seemed like people had a lot of trouble getting grounded and figuring out where to begin. I attributed that to people not having these skills."*

Asked about how his background influenced his *Making Connections* work, Yates said that, *"My experience working in communities and my appreciation for the value of assets that already*

***"There's a certain genius to being that open-ended. When you come in as a national foundation, everybody wants to just take your money. And that chokes out innovation and resident engagement."***

***—Bob Giloth***

*exist in a neighborhood—how important they are to making change in a neighborhood—was crucial. I also had a great appreciation for the skills and talents that residents bring, along with the deep dedication to solving these problems."*

*"Having worked in community change for so many years helped me appreciate the possibilities that existed in neighborhoods."*

But another part of Yates' background also helped a lot, he thinks. This was his long experience doing organizational development work. *"My training and background in organizational development helped me appreciate and understand group dynamics. What happens when groups come together to work?"*

*"The one thing that dogged us was an absence of appreciation for the science of organizational development."*

*"Specifically I understood the value of teams. In the very beginning, I saw the importance of forming a site team and then helping that team function."*

Given the importance of teams in this work, Yates thinks it was critical to have people who liked working together with others. *"If you don't like working with people, you can have a whole bunch of challenges trying to be a Site Team Leader."*

Not all the STLs had the same interest in working with people. Says one local coordinator: *"We had a Site Team Leader that didn't uti-*

*lize relationships as a mechanism for dealing with the work."*

The fact that Yates had worked in many low-income communities also made a difference. *"I had an innate comfort in working in these communities. I didn't feel unsafe or threatened or out of place. I think that too goes back to having worked so long in these communities."*

**A** couple of people noted another consequence of sending out existing, senior foundation staff to do this very challenging work in local communities.

Perhaps because some STLs sensed that they didn't have the skills to do this work, or because they really wanted to continue focusing on their field of expertise, or because (in the words of one STL) they simply didn't agree with the underlying theory of change, not every STL was fully invested in this initiative. Or at least that's the impression of some of the STLs.

Yates thinks that several people *"didn't really want to do this work. They reduced it to a set of do-able tasks. And they avoided the interaction around the bigger issues. Which undermined the open process."*

Another STL also thought that some people *"felt they didn't have a choice and they didn't want to do it. This should have been dealt with before assignments were made."*

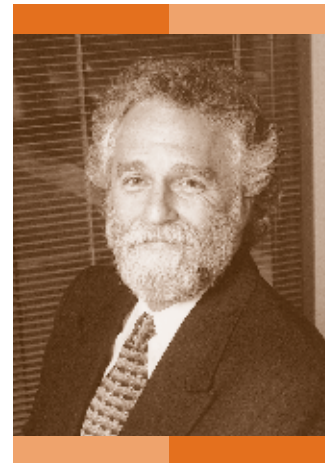
Oakland's **Bart Lubow** is open about how he felt about it. Asked what he learned about himself from performing the STL role, he said that it *"convinced me that I have no interest in being a philanthropic generalist. I am a justice system reform expert. That's what I do. That's what turns me on. That's the comfort zone I occupy when it comes to exercising influence and using expertise."*

*"My training and background in organizational development helped me appreciate and understand group dynamics. What happens when groups come together to work? The one thing that dogged us was an absence of appreciation for the science of organizational development."*

—Garland Yates

Being involved in *Making Connections* didn't mean that Lubow had to give up his justice reform work. Part of the idea was that he would bring that expertise to *Making Connections*. And he did to a certain extent early on in Oakland.

But the challenge for people who wanted to continue their existing work was that being the team leader for a *Making Connections* site—as this long list of needed skills and experiences communicates—was a big piece of work in itself.



Oakland STL Bart Lubow says this experience *"convinced me that I have no interest in being a philanthropic generalist."*

# The Diarist Project

## *A new approach to documenting and learning from change initiatives*

Over the past several years, The Diarist Project has been exploring a new way to learn from efforts to create change—primarily the Annie E. Casey Foundation’s ambitious *Making Connections* initiative—and to communicate what it is learning to people who can use these insights.

The diarist approach is a mix of journalism, oral history, process documentation, “journaling,” reflective practice and communications strategies. It has developed several guiding principles:

- **Learn from those who are doing the day-to-day work.** The core of the diarist process for *Making Connections* has been a series of periodic interviews with the people implementing this initiative in its sites. The assumption is that these people have a lot to teach...if only they had the time to reflect on and communicate what they are learning. Diarists give them this opportunity.
- **Learn as the work unfolds.** In *Making Connections*, diarists interviewed people every few months over the course of years, capturing their thinking as they were doing their work, experiencing challenges and developing strategies. The idea is to create a record of people’s thinking about the day-to-day struggle of implementing a project before memory fades.

But for many people, these interviews also became a way to explore and reflect on issues in their work, a way to think through their strategies and process what they were learning.
- **Learn about the process of implementing an initiative.** There are many good ideas about how to overcome poverty and strengthen communities. But often the challenge is how to implement these strat-

egies. Why does a strategy that works well in one place struggle in another?

Through the perspective of the people on the ground, diarists try to better understand how good ideas get implemented. We ask questions such as, *How do you build a sense of a team among disparate individuals and agencies?*, or *How do you insure that the “messy human stuff” doesn’t undermine the work you are trying to do?*

- **Communicate what you learn in a way that reflects people’s experiences and insights. And communicate in a way that the people doing the work will actually read and learn from it.** Diarists use extensive quotations to communicate what people are learning. We have come to see these quotes as a form of “data” that grounds the ideas not in numbers but in people’s actual experiences and ideas. Using many quotes from many people also communicates the reality that there are many perspectives about an initiative like *Making Connections*; we try not to oversimplify.

We also try to use these quotes and examples and stories to make our reports and reflections very readable. As Christopher Waller, the principal of an Atlanta middle school that was the subject of a diarist publication, put it: *“It’s easy to read, which means that people like me will be more apt to read it and apply it to their schools.”*

To learn more about the diarist work and to read other diarist publications, please go to [www.DiaristProject.org](http://www.DiaristProject.org). If you have questions, contact Tim Saasta at [Tim@CharityChoices.com](mailto:Tim@CharityChoices.com) or 240-683-7100.

