

REFLECTIONS

on Making Connections

Where the Rubber Hits the Road... The Evolving – and Growing – Role of Local Site Coordinators in *Making Connections*

To help build a national initiative from the ground up, the Annie E. Casey Foundation's *Making Connections* initiative has increasingly relied on "local site coordinators."

As the people on the ground dealing with the day-to-day challenges of implementing *Making Connections*, the coordinators are learning a lot about how to develop local efforts to transform struggling neighborhoods.

Early attempts to jump-start a long-term change process in struggling neighborhoods often began with the funder partnering with a respected local organization. It would receive a grant and run the initiative locally. The Casey Foundation's Rebuilding Communities Initiative, for example, supported "lead agencies" in each of its five cities, such as the Dudley Street Neighborhood Initiative in Boston.

When it began its *Making Connections* initiative in 1999, the Casey Foundation wanted to try a different approach. It didn't want to "anoint" one of many possible local organizations. Instead it aimed to build a team of organizations and residents who would lead the work in each community.



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—Bob Giloth

Six years into *Making Connections*, this appears to be a promising way to start a comprehensive community initiative. But it hasn’t eliminated the need for a foundation presence in each site, nor the need for staff who can help keep the initiative moving on the ground.

What has evolved in all 10 *Making Connections* sites is a local staff person who, initially at least, acts as the “glue” holding together the many parts of this ambitious, 10-year initiative. This “local site coordinator” or “liaison” role has quickly become important. Indeed, one Foundation staff person says it “could be the most critical staff role” for all of *Making Connections*.

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This report focuses on how the role of the site coordinator evolved over the first three or four years of *Making Connections*. It is based on a series of interviews of the coordinators that were conducted mostly in 2003 and 2004. A few new coordinators were interviewed in 2005. This report pulls together these individual reflections by site coordinators about this role.

By being on the ground, the coordinators have seen how an ambitious national initiative like this one is implemented locally. Given this, the coordinators were also asked to reflect on what’s worked in building local *Making Connections* initiatives and what the challenges have been.

There have been several changes in the role of the coordinators over the past two years, as well as changes in how the Casey Foundation works with the coordinators. The final section of this report discusses some of these more recent developments, which include regular opportunities for site coordinators to meet together as well as to interact with foundation staff who are running *Making Connections* nationally.

When *Making Connections* began in 1999, the lead staff person was to be a “site team leader,” a Casey Foundation staff person who was almost always based in Baltimore. That person was charged with leading a team of mostly Casey staff (evaluators, technical assistance providers, etc.) who would introduce and begin to implement *Making Connections* in each site.

This proved to be a challenging task. For one thing, many of the *Making Connections*

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—Garland Yates



Milwaukee Site Team Leader Bob Giloth with Milwaukee Site Coordinator Eloisa Gómez.

sites were thousands of miles from Baltimore. To explain *Making Connections* and build relationships with local stakeholders—something just about everyone involved with *Making Connections* agrees is vital—site team leaders needed to spend lots of time at their sites. That meant they were spending lots of time in airplanes.

To learn about their sites—another task that nearly everyone thinks is critical—site team leaders had to spend considerable time meeting and talking with local people.

All this was complicated by the fact that some site team leaders had to do this in more than one site. One site team leader had five sites!

Several “STLs” realized quickly that they needed help from someone local who already had local knowledge and relationships.

“I can plug in, I can add a voice at strategic times, I can act like a funder, but when I don’t live in the city, I can’t do the leg work, the organizing and relationship building,” explains Site Team Leader Garland Yates. “Once every 6-8 weeks is too big a lull when you are trying to start something. You can only be a grantmaker. You can fund things and check on them. But you can’t be a catalyst for change.”

In Seattle, the local site coordinator “just happened,” according to Bob Giloth, Site Team Leader in both Seattle and Milwaukee. “We realized we didn’t have the social capital to connect and pull everything together. So much of our strategic approach is to knit many efforts and players together, so a presence is critical.”

The coordinators agree. “I think it is essential to have a person on the ground that is seen as the main point of contact,” believes Des Moines’ first coordinator Jane Fogg. “It is about relationships and it is about trust and it is about access and knowing the work. It is someone who can manage the work locally and clarify and dialogue about the Foundation’s intent when messages aren’t clear to local leaders.”

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—Jane Fogg

“I don’t think *Making Connections* would be where it is without somebody on site, to tend to the day-to-day matters, to give people access to the Foundation, to give the Foundation access to key stakeholders outside the community, to have a more significant day-to-day presence,” stated Oakland’s former coordinator Fred Blackwell. “It would take a lot longer to [have as much progress as Oakland *Making Connections* has had] without a local site coordinator. The role is absolutely critical.”

Indeed, the role has become so critical in Denver that Cec Ortiz’s decision to take a new job was seen as a crisis for *Making Connections*, one that led to a major transition in this site, not only in relation to the change in coordinators but also to a transition in the governance and management of *Making Connections* - Denver.

As the work of *Making Connections* has evolved since it began in 1999, so has the role of the local site coordinators. Indeed, as *Making Connections* has entered its middle years, many believe that the site coordinator’s role has become central to the entire initiative.

What Does a Local Site Coordinator Do?

The Coordinator Role Is New, Different and Essential

There was never a cross-site job description for a local site coordinator. Much like the work of *Making Connections*, site coordinators learned their job by doing it.

The first coordinator – Denver’s Cec Ortiz – was hired in January 2000, with Fogg in Des Moines following in August 2000. In November, Seattle/White Center’s Theresa Fujiwara transitioned from her community economic development role into the local site coordinator role.

Blackwell in Oakland, Eloisa Gómez in Milwaukee, Lena Hackett in Indianapolis and Shannah Kurland in Providence were hired in 2001. Dana Jackson in Louisville and Yolanda Rios Rangel in San Antonio were hired in 2002. The newest local coordinators are Ana-Maria Garcia in Hartford, Susan Motika in Denver, Robyn Frye in Providence, Margaret Wright in Des Moines and Deborah Montesinos in Oakland.

Not immediately hiring one person to coordinate the work locally was intentional for Hartford site team leader Debra Delgado, whose first “coordinator” – Paula Gilberto – continued to work full-time for United Way.

“You simply have to wait for the right moment. I think if we brought on our site coordinator earlier than we did, it wouldn’t have had the same degree of positive impact. Ana-Maria Garcia came aboard just as the local leadership team started to gel and feel a real need for a full-time facilitator to bring its vision, mission, values, strategies and tactics to life.”

You Need a Local Site Coordinator to Tend to the Day-to-Day Needs

Early on, site team leaders looked to the local coordinators to help connect them to local

“You need to be able to relate to high-level executives from United Way as well as to encourage and include people who don’t speak English. I also serve as a social worker, a therapist, a chauffeur and the person who delivers the pizzas to the meetings.”

—Susan Motika

leadership, to spread the word about *Making Connections* and to be the voice and presence of Casey when the site team leaders had to return to Baltimore.

As *Making Connections* grew, all the coordinators began to provide day-to-day management and oversight in addition to maintaining partnerships with local stakeholders. The coordinators believe that it wouldn’t be possible to stay connected to the community without their day-to-day presence.

For Motika, who replaced Ortiz as Denver’s coordinator in 2004, that means being a jack-of-all-trades. “You need to be able to relate to high-level executives from United Way as well as to encourage and include people who don’t speak English. I also serve as a social worker, a therapist, a chauffeur and the person who delivers the pizzas to the meetings.

“We are multi-disciplinary problem solvers. We are conflict resolvers who understand and can withstand a high level of conflict.”

No Sinecure This!

This is from the job announcement put out by *Making Connections* – Denver as it looked for someone to replace Cec Ortiz.

Job Description

The Site Coordinator will promote a vision that builds community power and creates community-centered systems change. As the liaison between the Casey Foundation and the Denver initiative, the Site Coordinator is responsible for working closely with a team of local organizational partners to plan and implement strategies that advance the initiative’s goals. The individual who fills this position must be committed to acting in accordance with the Guiding Principles of *Making Connections*—Denver.

Responsibilities:

- Manage and provide financial oversight of an initiative with an annual budget of more than \$1,000,000.
- Develop resources and new partnerships.
- Lead a collaborative process to implement the neighborhoods’ community-change agendas.
- Develop and implement the initiative’s community-centered systems-change agenda.

- Represent *Making Connections*—Denver and Annie E. Casey Foundation at national meetings (travel 4-6 times a year involved; some evenings and weekends required also).

Qualifications:

- Ability to work with a wide variety of stakeholders, from neighborhood residents to funders and government officials, showing equal respect to all parties.
- Experience working in low-income neighborhoods and communities of color.
- Knowledge of public policy, specifically, how it is created, and how to influence its development and implementation.
- Understanding of public systems and experience with system reform.
- Established relationships within government, business and philanthropy.
- Organizational development skills.

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—Dana Jackson

Motika feels that one of the job’s main roles is to advocate for the coordinator’s city. “Being a coordinator means high level advocacy writing, making a persuasive case for the progress of your city based on fact, a candid appraisal of where you stand, to cast your city in the best possible light and to make sure your strengths are documented in a persuasive way.”

All the coordinators believe that it’s extremely important to have a point person on the ground to help tie together all of the *Making Connections*’ moving parts. Denver’s former coordinator, Ortiz, believes the local coordinator is the initiative’s “glue,” helping hold together all its diverse parts and stakeholders. “I think we’re critical to the success of this work.”

Several coordinators emphasized the importance of this role in bringing the many parts of MC together. Providence’s Kurland said she acted as the liaison between the local site team and the Local Learning Partnership, which is the initiative’s local data and evaluation arm. Oakland’s Blackwell said he worked “to make sure that all the folks who are consultants or staff members working on Oakland *Making Connections* have a feel for what’s going on and have a sense of continuity.”

Fogg interprets the work on the ground by listening to the voices of the community and sharing what she hears with the Foundation and others who are doing this work.

Garcia emphasizes communicating to a range of people in Hartford. “This will involve articulating what *Making Connections* is about

to a community-wide audience, not just to our Results Steering Committee and work groups, and to do it in a consistent way.”

Louisville’s Jackson sees herself as a person who has her feet in two worlds. “Often we’re asked to play a dual role as an agent of the local community, but also as an agent of the Foundation. It’s imperative for a local site coordinator to be transparent when working with local folks so they know where you stand while also representing the Foundation with integrity and credibility.”

It’s All in the Name

In most sites, the word “coordinator” has been used to describe the local person who coordinates the initiative’s activity related to *Making Connections*. That includes turning abstract ideas into functional activities on the ground. “I use the word coordinator purposely because I serve as the point person,” explains Fogg. “I’m a connector, an organizer, a broker who advocates taking advantage of the Foundation’s resources and finds ways for people to work together to accomplish our mutual goals.”

Jackson sees her role just as the title suggests: “I see myself as the local person who coordinates the work on the ground. That includes bringing partners together, bringing the local people together and bringing residents together. I see myself as being part of a larger team that helps to be the keeper of the flame, part of a local team where the rubber hits the road.” She’s a facilitator, a partner and an administrator of her local “movement.”

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—Theresa Fujiwara

Forging a good working relationship with their site team leader is important because that person has the knowledge, experience and the Foundation support to ultimately make many decisions for the sites, especially in *Making Connections*’ early years. That’s why Fujiwara believes the title “liaison” captures

her role best. “If I were coordinator, then I would take all of my direction from Baltimore and coordinate the work locally. As a liaison, I see my job as advising the work as much as implementing and organizing what needs to happen at the local level.”

A variety of backgrounds

- **Fred Blackwell** came from a local foundation working on another comprehensive community change initiative.
- **Jane Fogg** came with a wide network of connections crossing many constituencies. Her experience included working with foundations, strengthening public education, building community leadership, and advocating for policies related to education, children and volunteerism.
- **Theresa Fujiwara** worked at Asian Counseling and Referral Services for many years and on intergovernmental relations for Seattle’s former mayor, experiences that provided her with long-standing relationships with key players. She was able to tap into those relationships to bring these people on board.
- **Ana-Maria Garcia**, who is well known for her public service, worked in social services for the City of Hartford, for the Hartford YWCA, Hartford’s Board of Education, the U.S. Census Bureau and Capitol Community College.
- **Paula Gilberto’s** work at Hartford United Way had given her experience working with volunteers and in building relationships based on achieving agreed-upon results.
- **Eloisa Gómez** helped form Milwaukee’s Fair Lending Coalition, worked in the mayor’s office and sat on the City’s Community Development Block Grant committee.
- **Lena Hackett** is president and owner of Community Solutions, Inc., a consulting firm in Indianapolis that specializes in public health policy and community development.
- **Dana Jackson** came to this position from the Cabinet for Families and Children, where she served as deputy commissioner of the Department for Community Based Services. Prior to her tenure as deputy commissioner, she was the state director of the Division of Protection and Permanency.
- **Shannah Kurland**, in 12 years as a community organizer, managed a local organization, developed community leadership programming and supported a nationally recognized campaign around racial and economic justice for family child care providers.
- **Susan Motika**, an attorney and former community organizer, served as the first director of the Denver District Attorney’s Community Justice Unit and, as such, she was essential in the development of the Community Court in the Cole neighborhood, an early *Making Connections* - Denver success.
- **Yolanda Rios Rangel** had 20 years of experience doing fundraising for several nonprofit organizations in San Antonio. She also produced television segments on San Antonio’s NBC affiliate station around health and services in her community.

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—Lena Hackett

What Does It Take To Be an Effective Coordinator?

As more sites began to hire local coordinators, it became clear that they shared similar experiences and skills. They all had local connections from their previous work and had already established trust and credibility in their communities. Most came from systems and policy work, and most had had high-level

San Antonio Coordinator Yolanda Rios-Rangel: “I’m familiar to people. I have a very common face. People look at me and think I look just like their cousin.”



management jobs in community-based organizations.

What they all shared was the ability to bring together a team of people. “I’m not going to be able to have depth on everything,” Fujiwara noted. “It really takes a team of folks. In order to perform the job well, you’ve got to be able to establish relationships with key constituents and stakeholders and cultivate those relationships so you have some understanding of the local community and its dynamics.”

“You need people around you all the time who are smarter than you in terms of community building, in terms of issues,” said Denver’s Ortiz. “You need a diverse group of people around you who don’t just think the way you do. That’s critical for new ideas.”

As Hackett from Indianapolis puts it, “You have to have respect at all levels of the community. You can’t be a newcomer ...you have to be able to pick up the phone and call folks.” To perform the job well and help *Making Connections* succeed, Hackett says a local site coordinator also must be able to roll with the punches – “to realize that neighborhoods are constantly evolving so the work must evolve with them.

“This is not an entry-level position,” Hackett added. “It’s imperative that the local staff have the respect and the trust of the local community prior to representing Casey.”

You also need passion. Gómez strongly believes her personal drives are what help her perform her role. Gómez lived in Milwaukee’s

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—Susan Motika

Is there a lawyer in the house?

Coincidentally two of the newest coordinators, Ana-Maria Garcia in Hartford and Susan Motika in Denver, are both lawyers. Not coincidentally, both think their legal training will help in their *Making Connections* work.

Garcia believes that her background has helped prepare her for this site team role. “I think that the many administrative, policy and leadership roles I’ve played in the social justice arena of the Hartford community have really helped me deal with the

dynamics of this job. Advocating for the marginalized and disadvantaged members of our community has helped me tremendously.

“My legal training honed skills that help me navigate through difficult terrain to get to the crux of some complicated and confusing situations. This training has helped me to be able to identify the biggest problems that need fixing and the best opportunities for improving most situations I run into.”

target neighborhood for many years and still considers it her neighborhood even though she moved. “My church is in the area, my friends are still there and my parents live close by. Part of it is that I have a sense that this initiative is really going to make a difference.”

Jackson says that her newly adopted son has led her to rededicate herself to make sure she is not perpetuating what she calls “life’s daily indignities. Nothing in this world is as important as my son. But every child in my neighborhood deserves everything my son has. His life would have been very different. I am grateful that I have the opportunity to do the work that I do.”

You need an enormous amount of patience, a deep belief in participation and a focus on results, Motika said. “You need to bring a high threshold for problem solving and conflict to this work, whether you’re from Duluth or from Denver.

“Patience cannot be underestimated. This work demands flexible thinking where you are moving back and forth in different levels and disciplines. A strategy is evolving, changing and being informed by new ideas and the push and pull of community leadership.”

Jackson agrees: “You need to be flexible, be able to adapt and to multi-task in order to perform your coordinator role well. You have to understand both the local reality as well as have a sense of the Foundation world and to be able to balance competing priorities.

“You have to have vision and be able to implement it. It’s like being an inverted triangle. It’s great to have big ideas, but at the end of the day you have to turn that vision into an actionable item that aligns with the local will.”

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The relationship between the Site Team Leader and Site Coordinator is critical. This is “STL” Garland Yates with Denver’s Coordinator Susan Motika.

learning new things. I also like the fact that I am not the expert in any one area, but I’m here to learn as well.

“People appreciate that there is a lot going on at once and that someone is juggling all the balls and managing it. There is a sense that we are very conscious of each strategy and that there are things being worked on.

“You have to be a cheerleader and champion for people, to understand that our role is

to lift the voices of others and we have to be comfortable in a background role.”

Gómez agreed: “Our philosophy here is to help the strategy team partners be as successful as possible because they are our change agents.”

The relationship between the Site Coordinator and Site Team Leader is crucial, according to several coordinators. Hackett says that the Foundation needs to “invest in making sure that relationship works.” Part of the investment is simply an opportunity for the site team leader and coordinator to “spend some time together and figure each other out.”

What makes this relationship so important, Hackett believes, is that an initiative like *Making Connections* involves so much more than managing a relatively straight-forward project. “We needed to talk about how the work ‘feels’ and how that relates to how we do the work. We invest so much of ourselves in this work that we need to create an environment for reflecting on who we are in relation to this work.”

Kurland said something similar, emphasizing the need for the site team leader and coordinator to have similar values. “There needs to be a healthy exchange of ideas. This isn’t a good project for a top-down style.”

Blackwell agrees, saying that the way the site team leader and coordinator work together is critical. “Bart [Lubow] and I haven’t had a problem with authority. It’s been more

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—Eloisa Gómez

of a partnership. But I could see how there could be a lot of head-butting.”

The potential for tension in this relationship was probably the highest in San Antonio, the only site where the site team leader lives in the site. Victor Azios is Mexican American as is 90% of *Making Connections*’ target community.

“The community could resonate with Azios. Community is part of him. It’s not something he has to learn or listen for or try to understand,” Rios Rangel said. “Victor lives in San Antonio; he was living there before *Making Connections* ever came. Victor also worked on a Casey Family Programs Initiative. He knew the community for 15–16 years.

“Having a site team leader live locally enhanced the opportunities for us. He knew a lot of people already involved in children and family support services. Since *Making Connections* San Antonio is such a large area, having both a site team leader and a coordinator and setting up a team for San Antonio was the best thing.”

One obvious question was who would do what? Azios asked Rios Rangel to focus on social networks and efficient and effective services.

While this division of responsibilities helped, Rios Rangel says that having a local site team leader can still be “very challenging in a way. In Denver and Seattle’s cases, those sites advanced because they are doing the actual work in the sites and they didn’t have someone there on a daily basis.”

But after Rios Rangel studied the results of San Antonio’s community “summits,” it was obvious that “there was plenty of work for both of us.

“The greatest compliment Victor has ever paid me was to say, ‘I trust your judgment. I know you do it with good reason even if it is opposite of what I would do.’ We complement each other because we are different in how we approach things.”

Relationships, You’ve Got To Have Relationships

A solid relationship with their site team leader is just one of many relationships site coordinators must build. To do this work well, the coordinators believe they must have many existing relationships and be good at building new ones.

“It is all about relationships,” Jackson said. “That is the critical part in this world of *Making Connections*. Relationships enable you to establish rapport and trust. If you have that relationship, people will stretch in ways that they just won’t stretch if you didn’t have the relationship.

“It’s easy to be in relationships with people who share the same values as you, but many times in this work you need to search inside of yourself to find common ground with people who don’t necessarily agree with what you have to say.”

Garcia also believes in the importance of relationships. “I think the professional connections and professional working relationships I

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have developed over the years within this city have been very handy. It has proven to be a real advantage for me that so many people from the community think of me as a resource. I don’t necessarily think of myself that way, but it is kind of surprising how many people who can play important roles with *Making Connections* come to me asking for my perspective on community issues. This puts me in a good position to advance *Making Connections*’ goals.”

Blackwell came with family credentials: his mother and uncle are well known in Oakland community change work. “I brought a certain

Oakland’s former Site Coordinator Fred Blackwell: “Bart and I haven’t had a problem with authority. But I could see how there could be a lot of head-butting.”



set of relationships to the *Making Connections* initiative. I know people at City Hall, I know people who work in the community economic development agency, and I know people at the county. There’s a level of access, comfort and trust and familiarity that the Casey Foundation now gets by having someone like me.”

Rios Rangel also felt that level of familiarity. “I have a very common face. I look like they do. People look at me and think I look just like their cousin. I’m familiar to them.” Rios Rangel was also familiar to them because her father owned a neighborhood grocery store where she often spent her days working.

Rios Rangel was known by many residents because she hosted three local TV programs. She was the first Mexican American on English TV in San Antonio. “In an initiative like this you have to be persistent, personable, connect and network with all people.”

People in Milwaukee have also known Gómez over the years. “I’ve been around for such a long time, people know me either through my work or my volunteerism. I don’t have to explain myself to people because they know me.”

Kurland has contacts with many people and believes that she is able to balance being directive with being open to others’ opinions. “Direction combined with flexibility. It’s important to be able to move along that continuum until you find the right place at the right time.”

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—Cec Ortiz

It’s starting with what works,” Motika said. “One of my values is starting where people are, starting with what works and trying to build from that. The worst thing is for a leader to come in and say, ‘I know the way, this is the way, what you’ve been doing is all wrong’ and not credit the incredible foundation and skill that people bring.

“That is not my style. I want to work with people’s strengths, to enhance and add.” If something is not working, Motika wants to engage people in a discussion about why they think it’s not working and try to get them to identify needed changes. “This is all a very delicate balancing act.”

Ortiz also recognized that, “You have to emphasize relationships and the importance of relationships in whatever you do.” Building these relationships allows you to “do more, to be more, to go way out. To go much further than they would if they didn’t know you. They’ll tolerate more if they know you. If you don’t walk in with your suit or with your professional credentials.”

Indeed, given that a relationship is a two-way street, Ortiz said that, “It’s very important when you walk in that you know who you are and what you believe in. What are your ‘line-in-the-sand’ principles?

“If you don’t know what they are you’ll get lost in this work because it’s too big and there are too many great ideas. You’ve got to be able to be very clear.”

Motika strongly believes you can’t just build relationships with a select few. “You do

not want to limit yourself to a very select group that function as Platonic philosopher kings, but consciously reach out to broaden the base of your thinkers, creators, movers and shakers and lift up the ability and competencies of these people.”

Garcia agrees: “We need to create space for all kinds of residents—the thinkers, the doers, the leaders, the followers. We need to create an atmosphere in which people get comfortable with challenging the status quo on their own terms.”

Garcia also believes that celebrations can help cement relationships. “In an initiative as big and all encompassing as this, we need to make sure time is taken to celebrate the small victories. We need to make sure that when one group has a success, that we share it with the entire group. We need to celebrate each other’s successes. This is important because the residents will drive our progress and their efforts need to be recognized.

Gómez also wants to underscore the contribution that technical assistance has brought to relationship building. “That TA piece I would never undervalue, it has contributed to the success of all of our partners. Each one of them can say that it has contributed to their learning professionally or individually or has helped their organization build capacity.

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An opportunity to learn and grow

For someone who can do all this, the site coordinator role can be an extraordinary learning experience, something several coordinators talked about. Indeed one of *Making Connections*’ biggest early successes at fostering change may be the changes it has sparked in the coordinators themselves.

“This work has enabled me to use all the skills and experience that I developed over the past 20 years and put it to the test and made it just blossom,” Ortiz said. “I am not the same. My thinking about this work is not the same. I think it’s humbled me in a really good way.

“There are so many levels of the work that you can take on and learn from – the systems level, the community level, the organizational level. I believe I am more thoughtful, more knowledgeable, more experienced. My four years of experience here probably gave me a 300% jump. I could probably go into almost any situation and do a pretty good job because of this work. Yes, it’s changed me.”

Indeed, shortly after Ortiz was interviewed she was hired by Denver’s new mayor to run the city’s workforce development programs as executive director of the Mayor’s Office of Workforce Development.

Several other coordinators echoed Ortiz’s view. Fogg said that, “From a personal growth aspect, I have learned a lot through *Making Connections* about my own community that I wouldn’t have known if I hadn’t been introduced to this work.” Gilberto said the experi-

ence has helped her “improve my effectiveness at my United Way job.”

Jackson believes this work has changed her in significant ways. “It has made me more mindful of how I do my work. I feel that I have been blessed enough to experience things at both ends, from the bureaucratic and policy end to the community end.” She sees her work now as pulling those two ends together, trying to be “the little voice that gets heard.”

Hackett said the experience “taught me patience, strengthened my leadership and communication skills and helped me be more creative in solving issues.”

Kurland said it broadened her perspective about the work and developed new abilities. “I’m...better at understanding facilitation, understanding process and dynamics. I think I’m better at dealing with [difficult] people who don’t necessarily get it at first.”

This is the first time Gómez has been part of a piece of work where everyone at every level is accountable for their role. “Measuring results to the program level as well as the neighborhood level is something new and different and we’re excited about it here in Milwaukee.” This results-based work encourages her to look at how to create change differently.

Blackwell has benefited from being exposed to the national community-building world as well as seeing different approaches in other *Making Connections* sites. “To see so many ways to slice this thing and be successful has been amazing to me.”

“I think the people who get it the most are the families in the neighborhoods. They’ve been leading with ideas and not with money for years.”

—Shannah Kurland



What’s Worked? Why?

Because most site coordinators work on *Making Connections* every day, they are in a great position to see what’s working and why.

Lead with Ideas, Not with Money?

A mantra of *Making Connections* as it began was “lead with ideas, not with money.” Most coordinators believe that this mantra was effective.

“Organizing communities around money is always difficult,” Blackwell said. “That is why ‘leading with ideas’ is the right phrase. You’ve got to organize the community around their interests.”

Developing partnerships was the key to making this mantra work for Ortiz. “It’s building the relationships so that ideas become suggested and then adopted. You come in with the intention of building the relationship and then the relationship will let you talk about your ideas.

“It’s not that we don’t believe we have great ideas because we do. We’ve done a lot of work. We have a lot of resources. But there are a lot of people with ideas and resources. The difference is that we come in committed to developing a relationship.”

However, Fujiwara questioned this mantra. “Communities see foundations as financial resources. Foundations need to be really



Hartford Coordinator Ana-Maria Garcia:
“My experience in mediation and conflict resolution has been real helpful in this work.”

clear about what they mean when they say lead with ideas, not with money.”

Changing the thinking over time is how Fogg explains Des Moines’ experience. “Over time, the value of the Foundation’s strategic and results-based thinking has won over many of the initial doubters.”

“I think the people who get it the most are the families in the neighborhoods,” says

“Communities see foundations as financial resources. Foundations need to be really clear about what they mean when they say lead with ideas, not with money.”

—Theresa Fujiwara

Kurland. “They’ve been leading with ideas and not with money for years. They get it in their hearts. Ironically, I think it’s the people without the money who’ve picked it up the most.”

But money is still important, Blackwell cautioned. “I think the philosophy of not leading with money is the right one. The question is: how much money does it take to have an impact on the issues that we want to have an impact on?”

The idea of building a local movement around the need to strengthen families has been effective, Ortiz believed. “Families were really a way to bring people together. Everybody has one. And those who don’t want one. It is such a foundation of our society, whether you are poor or rich. That definitely did resonate. The focus on families clearly kept me out of hot water a lot. Our communities love families. That was important.”

There Needs To Be an Infrastructure on the Ground

While local site coordinators are all part of a Foundation-based site team, they still need to have a team of people on the ground to help move the work. Early on, site coordinators were individual consultants to Casey. The trend then became partnering with a local organization to establish a place to house the work and to gain an administrative structure.

As the work grew, so did the site coordinator’s role. Sites began giving grants in lump sums to local organizations that had the



Indianapolis Coordinator Lena Hackett:
“A great challenge is earning and maintaining trust in the neighborhoods.”

capacity to administer individual local grants at a pace that made sense to the community. For some coordinators, overseeing these grants became part of their role.

Several coordinators said that performing all these roles would be very difficult without an infrastructure. Hackett’s consulting firm, Community Solutions, Inc., provides her with an infrastructure that she cannot imagine operating without. “I don’t know how local site coordinators that don’t have an

“This is a new thing that Casey is trying to do, the commitment is large, the Foundation’s relationship as a partner is new and the expectation of results and accountability on all sides is new.”

—Dana Jackson

infrastructure do it. How do you get the printing done, flyers out and pay attention to the big picture?”

In Denver, the Piton Foundation gave Ortiz a place to call home, a place to house *Making Connections* and a place to hold meetings. *Making Connections* benefited from the in-kind support of Piton’s data, communications and administrative staff. Having several people working on *Making Connections* in the same office has also greatly helped coordination and communication, Ortiz believes.

Motika, Denver’s second coordinator, is also a project employee of Piton, which administers the Casey *Making Connections* funds. This enables Motika to get partial benefits. Piton also handles payroll processing.

Gómez has an office in the Nonprofit Center of Milwaukee, where most of her staff is housed. The Nonprofit Center contracted with Allied Churches Teaching Self Empowerment, which acts as her fiscal agent.

Along with infrastructure, the coordinator has to set up a communications process. Rios Rangel took on the role of establishing a local communications team in San Antonio. One of her responsibilities was to find a way for the site team to communicate, a task that shows how challenging the process of building an infrastructure can be. “Setting up a local area network so that everyone was able to have access to an email account and share files caused me a lot of grief.”

What Have Been the Biggest Challenges in Trying to Make *Making Connections* Work?

The idea of getting people and systems to do things differently is a challenge.

“The residents are saying this [*Making Connections*—Denver] isn’t the way it’s been done in the past even though it’s been impressive,” explained Ortiz. “We’ve all learned bad habits because people believed that this was just the way things are done. It’s hard to create the space for people to do things differently. But once people walk in that door, everything is fine.”

Getting local foundations engaged has also been hard, Ortiz said, even though *Making Connections*—Denver has a major local foundation partner, the Piton Foundation. “The foundation community has been hard. At first I think they questioned Casey’s motives. They also saw that to do this work they would have to change. This change dynamic has been the most challenging. And the fact that it’s so new to everyone.”

Kurland said that one of her biggest struggles has been to get systems to understand their role in the community change work. “We’ve got to get the social service agencies in particular. How do you get them to transform? To get them to listen to the community?”

Fogg agreed: “Having traditional decision makers create meaningful space for residents

***“Resident leadership was a very big challenge.
We had to be open to what we didn’t and don’t know.”***

—Eloisa Gómez



Providence's former Coordinator Shannah Kurland: “Ultimately this is a unique opportunity to influence how a foundation does its work.”

at the decision-making table was one of the greatest challenges.” She thinks that stakeholders need to be nurtured as they define this role by performing it.

One of Jackson's biggest challenges in Louisville was engaging partners in ways that are different from what they are used to. “This is a new thing that Casey is trying to do, the commitment is large, the Foundation's relationship as a partner is new and the expectation of results and accountability on all sides is new.

“Locally, the paradigm that people were used to is the funder-grantor relationship.” Jackson adds that the emphasis that *Making Connections* puts on accountability was also different. “No one was carrying the accountability message.”

She says people weren't used to a foundation being so engaged in an initiative. “Foundations often get the rap of being thinkers, not doers.”

Motika believes that *Making Connections'* focus on results can be a tool for getting people to work differently. A key to make this happen is to integrate the Local Learning Partnership “deeply into our work.” (The “LLP” is the part of *Making Connections* that generates data to help guide and evaluate MC's work locally.)

Motika says that Denver's Learning Partnership “has been playing a crucial role in helping communities define the problems and come up with possible solutions.” She believes it will play an equally crucial role in keeping the entire initiative accountable to the results the community wants. “So the evaluation is not something that sits on the shelf, but we use it and learn from it.”

One question is whether partner institutions will be willing to stay engaged when they start experiencing this push for change. This is why building strong relationships at the beginning is crucial according to Ortiz. “The relationships allow you to go much farther than you could if they didn't know you. They'll tolerate more.” She thinks this is especially true for residents. “Residents will go a

“You must go in very humbly, aware of all your limitations as an initiative. This is hard because you tend to want to go in and rule with an iron hand. You can’t.”

—Cec Ortiz

little further with you than they would if you walk in with your suit and your professional credentials.”

On the flip side, working with community and defining the role of the community has also been a tremendous challenge.

Reaching and mobilizing residents has been very difficult for many sites. Because communities have been ignored for so long, several coordinators noted that there is no easy-to-follow recipe for engaging residents.

“It was hard to make it real for residents,” Gómez said. “Resident leadership was a very big challenge. We had to be open to what we didn’t and don’t know. We had a sense of where we wanted to be, but we needed to learn the skills to get there.”

“Bob Giloth [Milwaukee’s Site Team Leader] initially struggled with this question of resident leadership. When he agreed to pay for a community organizer in April 2004, that really made a difference. I think we wanted to do that earlier, but it took realizing that other approaches didn’t work.”

“A great challenge is earning and maintaining trust in the neighborhoods,” Hackett said. “I feel like I work for it every day. I don’t think the neighborhood sees this as a 10-year commitment. It is day to day. As neighborhoods, they go from pillar to post to get what they can, where they can, to make the neighborhood better that day, that month. How do you enable community to think about a long-term vision?”

One key, Hackett believes, is to spend lots of time in the communities. “You have to learn who is out there, and pay attention to what their position is. It’s going to the neighborhood meetings. It’s going to the community festivals. Grilling the hot dogs at the church festival and talking to people and figuring out who’s out there and what’s important to them.

“You’ll find a lot of people who are doing a lot of stuff in these neighborhoods. They don’t hold positions of traditional leadership; they don’t want to be officers. They want to follow their passions.

“The respect you feel for folks has to be genuine and demonstrated in every interaction you have,” Hackett adds. “It is important to not undervalue just sitting in a meeting and talking to folks: drinking the glass of red Kool Aid after a meeting and eating the cookie that’s seen better days. It’s important to neighborhood people that you accept their hospitality.”

These are all small tests, Hackett believes. “If you’re not willing to sit at the table and share who you are, you are not going to be able to help build that community.”

As Ortiz said, “How do you help community believe that, as a partner, we’re willing to change?” Ortiz believes it is by “being as open as possible and walking humbly. Be very humble in this work, even if you think you know the answer. You must go in very humbly, aware of all your limitations as an initiative. This is hard because you tend to want to go in and rule with an iron hand. You can’t.”

“The largest challenge has been that the Foundation itself has not been real clear about its expectations of the initiative and of the community role.”

—Theresa Fujiwara

Fogg said something similar, reflecting on “how much I didn’t know” about community-based work when she started. “Someone new to this work should realize there is a lot to learn.” The theory of how to build community is far easier to understand than the reality of how you do it, Fogg said. She also commented about how much she believes she and others still need to learn.

“Some of us think we have the answers, but are they really the answers,” Rios Rangel asked. One example of this problem is offering English as Second Language classes after school without first asking the residents when they should be held. “After school, they need to get home and make supper for their children.”

“If we can’t empower and support residents, when are they going to have a voice?” Rios Rangel asked. “If you are deciding for someone else, where’s the empowerment of the community? And if you’re talking sustainability and getting to scale, if we’re still their voice, we’re not any better than the Anglos before us—the power brokers and the money lenders. How are you going to lead unless someone gives you the opportunity?”

Ortiz believes the key in doing community-based work is to be “very clear about being where the community is. If the community walks, we walk. We come in with a set of principles that says we are going to work with community and we won’t do a meeting without community being part of the discussion.

“I’m *asking* to be a partner, not telling people we are a partner. That has been really important.”

What Have Been the Biggest Challenges in Working with the Casey Foundation?

While the coordinators reported that their sites experienced very specific challenges in their neighborhoods, there was a general consensus about the following:

Expectations from the Foundation were unclear.

One of the bigger challenges for Kurland in the beginning was to answer questions about how *Making Connections* does its work. “What exactly is our directive? What are we supposed to be doing? Getting that clarity has been hard.”

Several coordinators said it was hard to get buy-in from local people for the concept of an initiative that was so abstract. Des Moines still manages the expectation that there is a huge payoff (referring back to the initial visits by Foundation leaders) that equals a \$10 million investment over 10 years.

“The largest challenge has been that the Foundation itself has not been real clear about its expectations of the initiative and of the community role,” says Fujiwara. “It was more, ‘These are the ideas around *Making Connections*, we don’t exactly know what it’s going to look like and it’s an evolving process.’” Fujiwara thinks that this lack of clarity and prescriptive nature that most people expect out of a foundation made keeping people around the table a real challenge.

“In the Board of Directors’ wisdom, they didn’t tell the sites how to do it. They wanted each site to be sensitive to the people. How could it be the same?”

—Yolanda Rios Rangel



Des Moines Coordinator Jane Fogg:
“Recognize that it takes time for local work to happen.”

San Antonio was clear about *Making Connections*’ bottom line: improving the lives of children by building up the community, according to Rios Rangel. “*Making Connections* was painted to me as residents needing to be in charge of their lives. The challenge that we had is that we did not give a clear, comprehensive message because some of our consultants translated that to mean you couldn’t have any institutional partners and stakeholders and it was up to the residents.”

Rios Rangel also saw an inconsistency between *Making Connections*’ emphasis on resi-

dents and the fact that, “Casey talks about system reform, neighborhood transformation and family development and the development of family support systems, but nowhere does the Foundation say ‘resident-led’ or ‘community-led.’ So how do you build community?”

However, in San Antonio, clarity was provided by Site Team Leader Victor Azios, according to Rios Rangel. “Victor said, ‘This is a community change initiative that empowers people to self determine what they want to do.’ That’s why we had the summits: so that community could tell what they were going to do to improve the lives of families and children.

“I remember Victor telling me ‘in order to do this work, we have to be selfless.’ I wanted to remain faithful to that. I can see residents trying to do it one more time to improve their own families.”

But Rios Rangel says that the lack of a prescription for how to operate MC was also a positive. “In the Board of Directors wisdom, they didn’t tell the sites how to do it. They wanted each site to be sensitive to the people, making it representative of the people and the language spoken. How could it be the same?”

Keeping up with the pace has been a challenge.

The biggest challenge for Gilberto was doing all the things that needed to get done for *Making Connections* in addition to her full-time job with United Way. She thinks the site coordinator role has become so large that it is close to impossible for people who can’t devote all or most of their time to it. Most of the

“It was challenging to not run ahead of the pace of the neighborhoods. It can be very tempting to follow the path of least resistance rather than working through the neighborhood culture.”

—Lena Hackett

coordinators now work full time because of this realization.

Another challenge Gilberto faced was keeping abreast of the changing nature of this work. “I am not sure this can be overcome because *Making Connections* is a work in progress.”

As a new site liaison to Hartford, Garcia had to begin by spending time “digesting the history of the *Making Connections* initiative in a way that will inform me where Hartford is now and what we have to do from here on out.”

She sees the next challenge as making sure that “all the various circles of activities related to *Making Connections* are not only moving within their own circles, but that they are all moving in the same direction.”

A challenge that Kurland faced in Providence was getting enough time for all people involved to sit down and think things through. “I don’t think the site team has enough time for that. They bend over backwards to be accessible. It would be nice if Audrey [Evaluation Liaison Audrey Jordan] weren’t on three different sites, for example. She does an amazing job, and is very giving, but at some point, you hesitate to ask her stuff because you’d just rather that she had a minute to breathe.”

There was also an issue of timing when it came to the residents and the community. “It was challenging to not run ahead of the pace of the neighborhoods,” Hackett said. “It can be very tempting to follow the path of least resistance when implementing the work rather than working through the neighborhood cul-



Louisville Coordinator Dana Jackson:
“Foundations often get the rap of being thinkers, not doers.”

ture. The long-term benefit is much stronger when the neighborhood’s time frame and pace is honored.”

Jackson agrees: “It was not an easy process to balance community expectations and Foundation expectations.”

One danger, Hackett believes, is that a too fast pace will end up involving “just the residents who immediately come to the table.”

“Community-level changes take time and often may seem slow to those wanting to see

“I’ve never felt alone and always felt that support was there when I needed it. The amount of information that the Foundation is willing to share has been incredible.”

—Ana-Maria Garcia

results right away. Meeting the expectations of the Foundation for coordinating new ideas and timelines, and giving the community time to absorb it all, is a tremendous balancing act.”

Fogg believes that it would be helpful if more people within the Foundation “recognized that it takes time for local work to happen. We can think of great ideas and great strategies, but how do we take those strategies to people without feeling like it’s imposed?”

Fogg believes the key is to start by introducing an idea and starting a dialogue around it. “I would invite our whole team to spend more time listening and responding in a manner that takes into account each other’s point of view. That might take a little more time but it’s critical to our success.”

Kurland has a somewhat similar concern, wishing that Casey staff and consultants who bring ideas and strategies to the sites would do more listening. “For instance, if they could say, ‘We’ve got some really good workforce development ideas, but we recognize that sometimes people are going to be coming from different places. We want to stop and listen to the community.’”

What was challenging for Fujiwara was that “two years into it, the Foundation decided they really needed to be results-focused and started asking for commitment around specifics that ran counter to what we were promising the community around process and developing commitment over time. We were out of sync in terms of timing. We had to declare results in March 2001. Up until December 2000, we were basically saying it’s a

listening process and once we gather all the information we’ll identify what results we want to commit to. We had to declare results earlier than where the community process was.”

Gómez didn’t realize the depth of the results accountability work. She feels that she is still on a learning curve. “I have found that to be a professional challenge. We want to be very, very real in Milwaukee about results. I don’t want any cosmetic results.”

Fujiwara also believes there is a need for more staff help to implement the many facets of *Making Connections* – Family Economic Security, workforce development, jobs, etc. – and help sites “nail down the co-investors so that we can get these strategies operational and off the ground. Everybody is just stretched so thin.” She believes that her site’s “Trusted Advocates” could do more to implement the strategies but “they’re all doing it on top of full-time jobs.”

Many local coordinators believe they need more support.

In relation to the support coordinators get, newer coordinators seem to have had a different experience than those who started several years ago. Garcia, Hartford’s relatively new coordinator, says that, “I’ve never felt alone and always felt that support was there when I needed it.” She adds that “the amount of information that the Foundation is willing to share has been incredible.”

However, Blackwell, one of the first coordinators, says that, “There’s a lot of variability in terms of access to information around site

“We needed a management plan, not just coming together every once in a while. We really needed to start working as a team.”

—Eloisa Gómez

team leader communications with local site coordinators.” Blackwell felt he had an advantage over some coordinators because he was the “TARC” liaison before becoming a coordinator and was part of a regular communications network through TARC, the Technical Assistance Resource Center of *Making Connections*.

While the Foundation provided considerable support to the TARC liaisons, Blackwell said, until recently there was very little support for the coordinators beyond what individual site team leaders provided.

Blackwell believes that a new coordinator needs to receive a good orientation not just to the community and the various local stakeholders, but also to the Foundation.

Gómez came from a very different place. Since she had worked on the Foundation’s Jobs Initiative and for Milwaukee’s Local Learning Partnership, she understood the way the Foundation worked. “It was very helpful to have worked with The Annie E. Casey Foundation before. I understood the Foundation’s goals, had a sense of some of the staff and how they operated, particularly Bob Giloth [her site team leader who led the Foundation’s Jobs Initiative].” With this background, Gómez had less to learn and more time to focus on getting things up and running.

Gómez’s main challenge was figuring out how to manage this rapidly growing initiative. “We needed a management plan, not just coming together every once in a while. We really needed to start working as a

team.” The initiative’s growth also meant it needed a more formal governance mechanism and “a stronger sense of direction.” Gómez remembers having to reevaluate her decision to continue as a coordinator since supervising and management weren’t the areas she particularly liked, but she decided to give it a try.

Through Site Team Leader Bob Giloth, the Foundation responded to this need, Gómez says. Giloth agreed to hire a local management consultant to interview every staff member and partner, do an assessment and offer recommendations. Giloth also agreed to keep the management consultant on board to help implement these recommendations and to continue to coach Gómez through this process.

“Not all coordinators needed that type of TA, but I did,” said Gómez. “I needed that because I wasn’t strong in the area of supervision and I wasn’t sure of the best procedure.” Having gone through some personal challenges of her own which forced her to cut back some of her hours in 2004, Gómez realizes her team would not have been able to manage the work and build the initiative without having made “this investment in building a team upfront.”

Hackett thinks that experienced coordinators are the perfect trainers. “There are local site coordinators who have amazing talents who could benefit all the sites.”

In 2005, the Foundation asked the coordinators to lay out some of what they needed to learn, which they did (see page 35).

“I don’t feel that sense of isolation because there is so much activity in Baltimore and I get to go there to participate”

—Fred Blackwell

Communication to coordinators has been a challenge.

Several coordinators also expressed a need for more communication from the Foundation, especially early in the initiative. Blackwell remembers one period when Oakland site team leader Bart Lubow was changing his role within the Foundation and Blackwell and his Oakland-based team “were completely in the dark about what Foundation management was doing. That was a scary time. We were feeling our way through that process. We came through it, but it was rough.”

Hackett wanted to both know of decisions made in Baltimore and to have an opportunity to influence those decisions. “I would like to have more of a presence there” and try to engage other *Making Connections* staff “who don’t see my role as strongly as people locally.”

She adds that, at times, she feels out of the loop in relation to decisions that affect *Making Connections*. “I think they have conversations and make those decisions.... By the time you have the opportunity to push back, it’s too late. They are already at the implementation stage.”

All this has changed somewhat as the site coordinators have begun to participate in monthly “Joint Operations” meetings in Baltimore and to meet with each other after these meetings. “I don’t feel that sense of isolation because there is so much activity in Baltimore and I get to go there to participate,” says Blackwell. He particularly appreciates his access to *Making Connections* coordinator Frank Farrow and other Foundation managers.



Milwaukee Coordinator Eloisa Gómez:
“We need to create space for all kinds of residents—the thinkers, the doers, the leaders, the followers.”

Farrow meets with the coordinators after every Joint Ops meeting.

Every site coordinator seems to appreciate the opportunity to interact with, support and learn from one another. They say that a strong bond has developed among them. “There are only nine other people in this country that share this role and do this work we call *Making Connections*,” says Garcia. “How can we learn and support one another?”

“Several times I made the decision that I would not disappoint local people. It’s a challenge to do what’s right for the local people without feeling like I am missing invaluable information from Baltimore. Can we explore other ways to stay in close contact?”

—Dana Jackson

Kurland would like to see even more interaction among the *Making Connections* sites. “Ultimately this is a unique opportunity for...a ground-up way of influencing how the Foundation approaches its work. To make it all work, it requires more opportunities to connect between sites.”

Early efforts to bring sites together were “just to hear and digest the Casey agenda,” Kurland believes. What she wanted was opportunities for site coordinators, families, agency staff and others to “all exchange ideas, what they’re excited about, what they’re struggling with, as well as think about how that relates to the Foundation so that it learns as well.”

Interestingly, the Foundation pulled together diverse teams from each site to meet in 2003 and 2004 at an “expanded” Joint Operations meeting. Part of the agenda called for teams from two sites to meet together to discuss some mutual challenge.

All coordinators appreciate the Foundation convening them as a group monthly and inviting them to Joint Ops meetings, but it also opens up new challenges. No doubt a few coordinators now remember the adage: “Be careful what you wish for!”

Many find it difficult to attend all the monthly meetings in Baltimore and ask if there are other ways to tap them into these meetings when they can not attend. “You feel the pressure that if your city is not represented there, your voice isn’t heard and you



Hartford's former Coordinator Paula Gilberto: “I’m not sure the challenge of keeping up with all the changes can be overcome because *Making Connections* is a work in progress.”

don’t have as much influence and access to decisions and the ability to advocate for your city,” Motika said.

“You don’t want to miss an opportunity. The Foundation has to realize that, as people deepen the level of their work, problems and conflicts require negotiation and laser-like problem solving. If you are leaving a city twice in one month for three days of travel at a time, you are really cutting into

“I find myself apologizing for the way Casey works and that hurts because I am very proud of the Foundation and I don’t want anything to diminish its reputation.”

—Jane Fogg

the ability of people to do what they’re supposed to do.

“You have to answer to all of these masters. I’ve got to advocate in Baltimore, but then I also have to deal with what’s on the ground if there is a crisis. If we are away, that stuff gets put on hold.”

Jackson said something very similar “New expectations that we would need to be at Joint Ops in Baltimore and then at cross-site opportunities makes me feel like I need to choose between what I need to do right here on the ground or what I do when I go to Joint Ops.

“Several times I made the decision that I would not disappoint local people. It’s a challenge to do what’s right for the local people without feeling like I am missing invaluable information from Baltimore. Can we begin to explore other mechanisms for staying in close contact?”

At the beginning of 2005, the Foundation announced that Joint Ops meetings would no longer be held monthly.

Working within Casey’s grant-making and reporting systems remains a challenge.

Fogg sometimes finds herself in the position of managing strained relationships between partners and the grant-making process. “I find myself apologizing for the way Casey works, and that hurts because I am very proud of the Foundation and I don’t want anything to diminish its reputation. Casey is a wonderful re-

source and loyal partner in this important work. We need to be very sensitive to how we communicate with each partner and how the trusting relationship is upheld.”

Grant recipients must go through an “amazing number of steps” to get a grant processed, Hackett said. “Nobody knows why it is that way While I think somebody said, Let’s fix it, I don’t think anyone ever circles back three months later and says, ‘Is it fixed?’ Because it’s not.”

Fogg added that “the Foundation completed a grant management scan to review the process and timelines of getting grant payments out the door. Results showed that the majority of grants got processed within an acceptable number of days. But that news came as a surprise to those of us in the sites whose experience has been to the contrary.”

Fogg added “that lack of payment for *Making Connections* work and/or supplies is often a challenge for individuals who personally cover expenses until payment is received.”

Several local coordinators also commented on the strain of responding to the Foundation’s many reporting requirements. “We recognize that it’s our responsibility to communicate back to the Foundation on how their investment is being utilized,” Fogg noted. “But there needs to be increased recognition on how we balance the demands of time and energy to accomplish community change locally and also meet Foundation-generated requirements.”

“There’s a deep seriousness among the participants that I see as a noble cause. My sense is that something great is going on.”

—Ana-Maria Garcia

What Has Surprised You about This Work?

Most coordinators were quite surprised about how the work has unfolded. The biggest surprise for Ortiz is how well it has gone. “People just keep coming.” It’s a surprise because at one point she thought, “God, what if this doesn’t move?”

Another big surprise for Ortiz was working with her site team leader, Garland Yates. “I

White Center (Seattle) Coordinator
Theresa Fujiwara: “Everybody is just stretched so thin.”



didn’t know what it was like to work with someone from far away because I’ve never had to do that. It’s been so easy. It was alignment that was critical. It was surprising because things don’t tend to go that easily that quickly.”

Gómez is surprised by how much Casey has invested in technical assistance and staff support. “Clearly, the message I get is how can the Foundation help the neighborhood be successful? We have a similar message to our partners: how can we help our partners be successful?”

Being able to shape the initiative came as a surprise for Kurland. “I think that we have a lot more room than I expected to be able to decide how this initiative works. We have the chance to shape *Making Connections* on the ground.” She was also really surprised to learn that the Foundation staff figures it out as they go along, too.

The most pleasant surprise for Fogg was that the *Making Connections*’ message about the need to strengthen the family and the community was a fairly “easy sell” to the community.

“Another surprise has been that even though our community partners agreed on the vision, it was still hard to get people out of their particular silos to collaborate and combine resources,” Fogg added.

Fujiwara saw surprises as being part of the work. “You just have to work your way through it. There’ve been little ones, like, ‘Surprise, you’ve got to get a report in next week!’”

“National consultants can stimulate ideas but can run into difficulties around implementation. You have to know the local community in order to do that.”

—Theresa Fujiwara

Garcia is “thrilled with the quality of work and the brain trust behind the work. There are so many people dedicated to bringing about positive changes in the lives of Hartford’s children and families. There’s a deep seriousness among the participants that I see as a noble cause. The support team and the Results Steering Committee work collaboratively toward achieving sustainable changes for children and families. My sense is that something great is going on.”

Hackett was surprised at how involved she became in the work and how consumed she has gotten. “You know, I never intended this to be such a significant piece of my work – it just snuck up on me. That is not a complaint – just recognition of how the work grows.”

What Could the Foundation Do To Help You Do This Work?

When asked this question, local site coordinators made four suggestions:

1. Continue technical assistance to the sites, with an emphasis on building the capacity of the community.
2. Engage coordinators in the continuing development of the initiative and the *Making Connections*’ decision-making process.
3. Recognize and try to respond to the pressure of multiple expectations that many coordinators experience.

4. Improve the Foundation’s grant-making system.

Build local capacity

Building the capacity of the site continues to be the first priority. Several coordinators reported that cross-site learning exchanges have been great opportunities for site teams to gain more knowledge regarding the many strands of work related to the initiative.

Coordinators continue to push for building the capacity of the people on the ground. As Fogg puts it, “There will be a time when the local site coordinator role no longer exists, and if I am successful I will work myself out of a job.”

Motika also believes in building the skill level of coordinators, staff and residents involved in the initiative, especially their conflict resolution and mediation skills and their understanding of restorative justice.

In relation to bringing in skilled TA providers, Motika says, “they have to be people who can look at the problems through the prism of race, class, culture, gender and power issues. We need to set the bar very high for who can work well with our community.”

Fujiwara, along with others, says that using local people as technical assistance providers is important. “There’s always a risk in bringing in national consultants who are on the learning curve. They can stimulate ideas but can run into difficulties around implementation. You have to know the local community in order to do that.”

“I think the culture needs to be looked at: the expectation that everyone should work 18 hour days.”

—Susan Motika

Hackett would like more of a “head’s up” when other Foundation staff and national consultants come to Indianapolis “so we can have time to figure out how to maximize the impact and add value to what they are doing. They’re doing good work.... It rarely creates conflict. I just wonder if we are missing an opportunity to leverage each other’s work. I always wonder, ‘Couldn’t we do this better and hook it into our work?’”

Continue to increase the coordinators’ role in *Making Connections*’ development and decision-making.

As the role of the local coordinators grew as *Making Connections* developed, many of them felt a need to be more involved in discussions and decisions that were happening in Baltimore.

In response, coordinators have been participating in monthly “Joint Operations” meetings. This has allowed them to participate in discussions, understand expectations on the sites and perceive what supports are available. They believe their participation ensures that they know of decisions in a timely manner and have the opportunity to weigh in.

Not only do they now meet regularly with those who manage *Making Connections* nationally, they also have been involved in helping the foundation develop key products, such as a tool for assessing each site’s capacity to implement its strategies for change.

But at least some coordinators still believe many core decisions still are being made in Baltimore. They cite the many time-

consuming requests made by the Foundation combined with the rapid pace of new ideas flowing from it.

“The actual strategic decisions, the investment decisions and some of the technical assistance decisions seem like they are still being made and imposed by people who don’t live here,” said one coordinator. This coordinator believes that this violates “the spirit” of *Making Connections* and reflects a lack of understanding of how much time that meeting these requirements and responding to these ideas demand.

Understand and respond to the pressures on coordinators.

As Jackson says, “The biggest challenge for me is being able to balance those two worlds.” Part of this pressure comes from the need to balance being in Baltimore with being in their sites.

While Motika agrees that requiring staff to travel to Baltimore plus attend cross-site learning exchanges is burdensome, she thinks all these meeting and learning opportunities are useful. She thinks that scheduling meetings could be tweaked. “How can we cull and combine meetings so that Joint Ops isn’t tacked onto another cross-site learning opportunity? How do you shorten the length of cross-site learning opportunities? Three days is too long.”

Motika also thinks technology could help. “Can we opt to use video conferencing in multiple sites? This could allow western sites to be part of a meeting without traveling to it. She also wonders whether more meetings couldn’t be held in the West.

“While the Foundation says it wants to do its work differently, we are all learning what it means to actually do it differently. It takes a lot of time and energy to change the way the work is done.”
—Lena Hackett

But Motika sees a larger problem underlying all the expectations coordinators experience. “I think the culture needs to be looked at, the expectation that everyone should work 18 hour days.”

Shortly before she left as Denver’s Local Site Coordinator, Ortiz talked about the demands this role places on people. Part of it, she believes, is that as you succeed in the work, the role becomes bigger. “There are more people to relate to, more activities to keep track of. I don’t want to be negative but you are going to burn us out if somebody isn’t paying attention. We don’t want to burn out because we love the work, but that’s not enough.

“I think there needs to be more critical thinking on this role. Right now we fulfill a function for *Making Connections*. It’s not that we’re not respected.” But the role and the work it entails have not been thought through enough, Ortiz thinks.

Hartford’s Gilberto believes that the same pressures are felt by the site team leaders. She urged the Foundation to “free more time for site team leaders to spend on *Making Connections*. This way, site team leaders would have more time to coach the coordinators on the front end and on an ongoing basis.”

Improve the Foundation’s grant-making system.

Even though the Foundation has made many improvements to its grant-making system, nearly all the coordinators reported that it is still hard to see the improvements at the local level. There are still issues of delayed payments.

Hackett sees parallels between the struggle to get local systems and institutions to change and the struggle for a national foundation to change how it does its work. “I think that, while the Foundation says it wants to do its work differently, we are all learning what it means to actually do it differently. I think when people are pressed to get their work done they do it the way they’ve always done it. It takes a lot of time and energy to change the way the work is done.”

What Will the Future Bring?

As Ortiz pointed out, “Local site coordinators were never planned out. It’s something Casey realized they needed as the work evolved.”

Some local site coordinators believe that their role will evolve into the site team leader role at some point. “I am not sure the Foundation can sustain the level of site team leader commitment they have had over the rest of the 10 years,” Hackett said. “They are going to want to use their site team leaders for other pieces of Casey work and at some point that ‘other work’ may become the priority.” (Indeed, by early 2006, most of the sites will no longer have active site team leaders.)

This evolution of local site coordinators taking on the site team leader role would be natural, several coordinators believe. Blackwell thinks that as the initiative matures, local coordinators will be more accountable for what happens.

“The increasing role of the site coordinator is good because it moves the initiative a little bit more away from the Casey Foundation. The Foundation retains a stake and a role but not as much the driver’s role.”

—Garland Yates

In the beginning, Blackwell saw ideas flowing from the Foundation to the sites. “Now there is a process of shifting the focus to local sites, precipitating greater responsibilities for the local site coordinators. Along with more local authority comes more local infrastructure. The local site coordinators will become more responsible for managing the infrastructure rather than actually doing the programmatic work.”

Kurland sees the local coordinator role becoming “more organized, focused and strategic.” Blackwell agrees, believing that the coordinators will gradually get “more responsibilities and be more accountable for what happens,” which he thinks is a natural evolution given the *Making Connections* emphasis on place-based change.

This evolution will mean that the site coordinator role will take on more management and administrative functions rather than programmatic functions. “As this goes along,” Blackwell thinks, “I assume that the coordinators will step away from being the programmatic people and move toward managing a group of people who are actually doing this work.”

Denver Site Team Leader Garland Yates, who hired the first coordinator, agrees. “Management is becoming more the issue now. Keeping your eye on the big picture. Making sure people are supported and plugged in.” He adds that the site coordinator will also increasingly be called on to be a “strategic thinker,” a role that Yates played for Denver in *Making Connections*’ early days.

Yates thinks the site coordinator role “could be the most critical staff role. The part-

ners need someone to relate to who holds them together and lets them know what’s going on.”

He thinks this change is good. “It moves the initiative a little bit more away from the Casey Foundation. The Foundation retains a stake and a role but not as much the driver’s role.”

But if the coordinators have more influence, “then we have to be clearer about the competencies and duties of this position. Now it is pretty much what the STL thinks.”

The Foundation also needs to be certain that each site is ready for this change. “A lot depends on the health of the local initiative. If the initiative is strong locally and has a good solid leadership core, we know this person will receive the kind of guidance and support they will need to succeed.

“If it is not, we’ll be turning over a lot of money and authority to what could be a handful of people and institutions who haven’t built substantive relationships with residents and families. They might involve families in their work, but they wouldn’t see themselves as accountable to them in any functional way. So then you’d be hoping that your site coordinator is the right person. If not, they could do a lot of damage. It could become a colossal mistake.

“If we didn’t have a good grounding in Denver, if I just had five people and we gave Susan control over this money, that wouldn’t be good.”

***“The liaison needs to be the advocate for
a responsible transition.”***

—Theresa Fujiwara



Denver's Site Coordinator Susan Motika:
"Our role is to lift the voices of others. We
have to be comfortable in a background
role."

Changes in the site coordinator's role are also going to force the question of the site coordinators' status, Blackwell believes. "I find it somewhat difficult to manage this project, especially now that I have some site team leader responsibilities, without being a staff person at the Foundation."

It can be an issue of authority, Blackwell thinks. "It's sometimes difficult to garner the same kind of respect and accountability you would have if you were a senior associate at the Foundation." He thinks the Foundation

should rethink its policy of not having employees outside of Baltimore. "If the site coordinator is an arm of the Foundation, then I think it's important symbolically and in terms of authority to make those folks Foundation staff."

Another pressing issue is what happens if local site coordinators or site team leaders leave the role, something that has already happened at many sites. This transition process is difficult and needs to be carefully thought out, the coordinators said. [How Denver went through the transition to a new coordinator is explained in another diarist publication: see page 36.]

Fujiwara believes the key point will be when the local coordinator and local partners begin to make the decisions about activities and Foundation investments. "I think that truly will be a foundation empowering the local community."

A key role of what Fujiwara calls the site "liaison" will be to make sure that there's a "responsible transition," with the Foundation not suddenly getting excited about something else and moving on too quickly. "The liaison needs to be the advocate for that responsible transition."

Transition to local ownership is a topic that many coordinators are concerned about, particularly how it will happen in their sites.

Rios Rangel talks about the need to really understand what transition and sustainability mean. "Transition will have a big impact on San Antonio. You can't just pull the site team leader out. We can try to phase him out, but

“There will be more local ownership, there will be more partners at the table, the Annie E. Casey Foundation will not be the primary focus and voice, but will share that responsibility.”

—Yolanda Rios Rangel



The first coordinator was Denver's Cec Ortiz: “I think we are critical to the success of this work.”

how do we do that when they see Victor on a daily basis?”

Motika sees the future of the coordinator's role as continuing to be a convener, a multi-disciplinary problem solver and a strategic implementor on results. “Being able to leverage and bring in new partners and new resources both from the city and other funding partners” will be key, Motika believes.

She also thinks a future challenge will be to “make data and a learning relationship with a large local university more responsive to community needs. [Each site's “Local Learn-

ing Partnership” works with a local university or research institute.] How do we create this reciprocal, symbiotic relationship where the data and the learning needs of *Making Connections*—Denver can be addressed?” This is key, Motika believes, because of the potential that data and evaluation have for keeping *Making Connections* and its partners accountable to the community's needs.

“We don't always have to look outwardly for technical assistance,” Motika adds. “We've got incredible resources within our walls. How do we use that and strengthen that relationship so that learning and data can be used to achieve *Making Connections*' goals?”

Rios Rangel also believes that her task is to ensure that the tables are convened and that the community representation is there. She thinks it will be particularly important that as *Making Connections* San Antonio collects data, community people will know how to analyze and use it. Not having consultants be responsible for tasks like these will mean that, “There will be more residents involved. I believe the work is coming of age.

“There will be more local ownership, there will be more partners at the table, the Annie E. Casey Foundation will not be the primary focus and voice but will share that responsibility.”

What Garcia sees on the horizon for *Making Connections in Hartford* is that more and more people will be asking, “Have you touched base with *Making Connections*?” And that, she feels, is a good thing.

“We don’t have to look outwardly for technical assistance. We’ve got incredible resources within our walls. How do we use that and strengthen that relationship so that learning and data can be used to achieve Making Connections’ goals?”

—Susan Motika

In getting to this point, the site coordinator will be key. Indeed, as the Casey Foundation searches for strategies to make *Making Connections* sustainable, Ortiz firmly believes that, “This role is part of the answer to how you sustain an initiative like *Making Connections*.”

Helping coordinators learn specific skills

As the role of the site coordinator has become better defined, what coordinators need to do to perform this role effectively is becoming clearer.

In 2005 the coordinators developed a “learning agenda” to help meet these needs. They agreed to focus on one topic at each of their national meetings. The topics included Coaching and Feedback, Interest-Based Negotiations, Results-Based Facilitation, Nuts and Bolts of the Work and High Conflict Resolution Skills.

Coordinators report that this focused training has been very helpful. The session on Coaching and Feedback, for example, offered a tool called a Medicine Wheel that several coordinators said was helpful.

Rios Rangel said that this tool helped her “better understand why we act and respond in a certain manner.” She added that this tool has helped her in neighborhood meetings in San Antonio because she was able to “understand why some residents were acting and reacting in the way they did.”

Garcia said that the Medicine Wheel had helped her “step into other roles that may not be present at a meeting.”

The session on negotiations was very helpful for Fujiwara. “It was useful for me in dealing with a complex but critical partner here at home. The training and the space it created for reflection allowed me to think through the culture and power dynamics affecting the relationship. I have tried a new approach that has had positive results.”

This session gave Rios Rangel a framework to use when interacting with others. “The language and clarity it provided was very useful.”

Motika agreed. “Negotiations come up in my work so much that having practical techniques coupled with the theoretical background was very helpful.”

The Results-Based Facilitation training allowed the coordinators to practice among themselves, which several thought was quite useful. “Receiving constructive criticism from our peers is very helpful because it hits at the core of how we can improve our ways of working with others,” Rios Rangel said.

This feedback from peers coupled with strong mutual support has been critical as the coordinators have learned how to do well in this very new role and survive its many demands.

“Our ability to form a professional support network among ourselves,” Hackett explains, “has been of the greatest value through all of this.”

“This role is part of the answer to how you sustain an initiative like Making Connections.”

—Cec Ortiz

The Diarist Project

This is one of a series of publications about the Annie E. Casey Foundation’s *Making Connections* Initiative put together by The Diarist Project. The project is a new approach the foundation is using to learn from its efforts to strengthen families and transform struggling neighborhoods.

Diarists work to capture strategies and insights of the people who are leading the neighborhood transformation work. In *Making Connections*, the diarist works closely with the staff people who lead the work in each city, the Site Team Leader and Local Site Coordinator.

This report was written by Grace Giermek, who helps manage the diarists and local communications partners and support the site coordinators. It was edited by Tim Saasta, diarist coordinator. It was initially published in April 2005.

Making Connections is a Casey Foundation initiative to support work that demonstrates the simple premise that kids thrive when their families are strong and their communities supportive. What began in 1999 as a demonstration project in selected neighborhoods in 22 cities is now an intricate network of people and groups committed to making strong families and neighborhoods their highest priorities.

The Annie E. Casey Foundation works to build better futures for disadvantaged children and their families in the United States. Its primary mission is to foster public policies, human service reforms and community supports that more effectively meet the needs of today’s vulnerable children and families.



Seattle/White Center’s
Theresa Fujiwara.

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DiaristProject.org

All the diarist publications are available at no cost at www.DiaristProject.org/pubs. Information about the diarist work and additional reflections about *Making Connections* are also available on this website.