

## MEMORANDUM

From: Ann Beeson and Diana Morris

To: U.S. Programs staff in New York and Baltimore

Re: Effective Collaboration

Date: March 7, 2011

All of us value the interest, expertise, connections, ideas, and programming that our colleagues bring to our shared vision and goals. Ongoing exchanges of information and collaboration among staff in New York and Baltimore help us all undertake our work as strategically as possible. OSI-Baltimore is part of U.S. Programs and focuses specifically on work in Baltimore and within Maryland. The Baltimore staff brings unique expertise on issues in Baltimore and Maryland – and has a valuable perspective on state and local issues generally, as well as the state and local implications of much of U.S. Programs’ national work. U.S. Programs staff in New York brings a breadth of expertise on the issues and a valuable national perspective, as well as knowledge about state and local issues. National staff also often works on distinct national programs of which Baltimore or Maryland are sometimes one component.

Our unique structure presents both challenges and opportunities. To ensure that we all work in a coordinated, collaborative, efficient, and strategic way, we suggest the following protocol to guide work in Maryland:

- 1) *Designating liaisons for communication between Baltimore staff and national staff.* To make communication efficient and reliable, OSI-Baltimore has designated liaisons for each of the national funds and campaigns. The liaisons are listed at the bottom of this memo. The point people for communication in New York are Program Directors and Campaign Managers. Communication between liaisons and point people is sufficient for following the protocol outlined below. The expectation is that Baltimore liaisons will share information with other staff in Baltimore as appropriate, and that point people in New York will share information with national staff.
- 2) *Including Baltimore and Maryland in national grantmaking targeting cities and states.* Wherever possible and appropriate, national grants targeting particular states and cities should include Maryland and Baltimore. In those instances where Maryland is not a target state for a national fund, national staff should consider making one or two discrete grants in Maryland in order to connect the region to the national goals.
- 3) *Sharing the lessons of Baltimore.* OSI-Baltimore staff, maximizing the office's role as a laboratory, will share lessons learned at the municipal and state levels that are relevant to U.S. Programs’ national funds and campaigns. This should be done through

periodic all-staff meetings, preparing and circulating relevant material, and one-on-one conversations. When Baltimore staff hears about national programs that their local knowledge can help inform, they should take the initiative to reach out and share their perspective.

4) *Sharing information about meetings.* As early as possible, Baltimore staff should inform their colleagues in New York about meetings they plan to attend with national grantees or foundations that relate to OSF's national funds or campaigns or local developments that might be relevant to ongoing strategies. Staff in New York should inform Baltimore liaisons as early as possible when planning to visit Maryland (including whom they plan to visit and the general focus of the meeting). This ensures that Baltimore staff hears about the meetings first from fellow staff rather than from others, allowing us to work in a unified and informed manner.

5) *Including colleagues in meetings.* There may be times that national staff needs to meet with organizations in Baltimore without OSI-Baltimore staff in attendance, in order to develop their own relationships with organizations. In those cases, Baltimore liaisons should be aware of the meetings in advance (see above) and national staff should make it clear that they intend to meet with the organizations on their own. Otherwise, national staff should invite Baltimore staff, when possible, to meetings in the region that involve OSI-Baltimore grantees or recent grantees in order to ensure that Baltimore's ongoing relationship with the organization will be based on a full understanding of new or possible additional linkages to OSF and the organization's work.

6) *Sharing information about people and groups "of interest" in Maryland.* National staff should seek out information from Baltimore staff about organizations or people "of interest" in Maryland and the political/social context in which they operate (by including Baltimore staff in meetings, contacting them in advance, or debriefing after key meetings). OSI-Baltimore staff should share the "intelligence" they have developed over the years about the broader context in which individuals and organizations are operating, the capacity and track record of key players, the needs of a field, and the other donors interested in the field. New York staff should also share their impressions of people and groups working in Maryland, including how they fit into national fields and strategies. If Baltimore staff voice concerns about national staff making a grant to an organization in Maryland or partnering with groups or people in Maryland, national staff should give serious weight to those concerns. National staff may make different determinations about whether to work with people or groups in Maryland, but if the Baltimore staff's objections are particularly strong (for example, if the Baltimore staff is clear that a Maryland group should not receive a grant), then the national staff should defer to the Baltimore staff.

7) *Sharing proposals early in the process.* National staff should share proposals relating to Maryland that they are interested in supporting early in the process so that Baltimore staff can provide meaningful input.

8) *Informing colleagues about relevant events.* National staff should apprise Baltimore staff of events in Maryland or the region in a timely manner when the events involve Maryland/Baltimore agencies or grantees or OSI-Baltimore's program areas. Baltimore staff should apprise national staff of events being held in Maryland that relate to the focus of national funds and campaigns.

9) *Committing to regular communication.* Where program priorities in Baltimore and the national work overlap or are very closely related (e.g., Campaign for Black Male Achievement, Criminal Justice Fund, Campaign for a New Drug Policy), staff should hold periodic meetings to clarify program goals and strategies and to continue improving our means of regular communication. Staff in Baltimore and New York may approach their work with different emphases or with different frames, but external audiences view OSF's work as being one, inter-connected effort. To ensure that we reinforce each other's work and do not inadvertently undercut it, regular communication among New York and Baltimore staff is critical.

#### OSI-Baltimore Liaisons for National Funds and Campaigns

Criminal Justice Fund – Monique Dixon

Campaign for a New Drug Policy – Chris Shea

Campaign for Black Male Achievement – Jane Sundius

Campaign for Black Male Achievement Strategic Communications – Debra Rubino  
Communications – Debra Rubino

Strategic Opportunities Fund, Arts to Achieve Social Change – Debra Rubino

Strategic Opportunities Fund, Emergency Response – Pamela King

Democracy & Power (including re-districting) – Pamela King

Soros Fellowships – Pamela King

Transparency & Integrity Fund – Diana Morris

Equality & Opportunity Fund – Diana Morris

Seize the Day – Diana Morris

Special Fund for Poverty Alleviation – Diana Morris

DC Office – Diana Morris