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MEMO TO: Ann Beeson
Nancy Youman

SUBJECT: US Programs & Annual Budget
Review of Equal Opportunity Fund
& Strategic Opportunities Fund

Dear Ann and Nancy

Thank you so much for the immense amount of work contained in the two binders you sent me. Although the content seems somewhat daunting at first, I found the detail stimulating and absorbing even though I have not been able to put the time into this assignment that I might have done under other circumstances. But, at the very least, let me congratulate you for putting together such a coherent set of documents.

As I looked through the materials I realized that two vectors influence my thinking on this assignment.

For almost three years I worked as Executive Assistant to the Budget Director of the City of New York. Fred Hayes was something of a legend in the second Lindsay term in the late 1960s at a time when the City Budget was not computerized and the concept of a program budget was alien to the old line budget examiners. Hence, I am deeply respectful of those who do budget construction and diffident about how helpful those without intimate knowledge of the program ideas and management priorities can actually be.

Secondly, I moved to rural Connecticut and became involved in local issues because I wanted to see whether all that policy-wonk experience I'd had in previous decades enabled me to actually make a difference in the lives of individual people. Hence, my program perspective tends to the minutiae with an emphasis on "what does it take to make this work" and what are the demands on the quality and quantity of human capital.

EQUALITY & OPORTUNITY FUND

The US Programs organizational structure and the issues and challenges are creative and very ambitious. I am reminded of the fact that there is a reason that programmatic silos have been common practice – it's easier to think about the issues and it's easier to make the grants.

I defer entirely to staff and other members of the Board on the choice of issues and campaigns for this Fund. My concerns are primarily managerial.

Designing new concepts and linking the complexity of myriad issues involving “liaison”, “partnering”, “collaboration” are all immensely time consuming. This shows up in the under-spending on program development and Raquiba's travel time. I only flag this detail because it's early days and it could be that program development turns out to be more expensive and more time-consuming than we imagine. The same goes for the convening function. If grant-making is slow getting off the ground because staff time must be spent in priming the pump, all to the good from my perspective.

Time will tell on how the programs pan out and whether the plate is too full and which issues float to the top. My priority issue would be Neighborhood Stabilization and I strongly support the memo seeking extension funding. In fact, I would hope that OSI keeps this issue on the front burner for at least a decade.

The philanthropic climate is deeply troubling. Somewhere in your materials, there is reference to the fact that all the OSI issues are under-funded in the broader foundation community. Reference to the “philanthropic community continues to move at a glacial pace and is far less nimble than the times or the grantees require” (in the Democracy and Power strategic plan) strikes home with vengeance. I wonder whether OSI will have to narrow focus in some of it's areas, simply because the partners don't exist or finding them is like pulling hen's teeth? Or the work-load forces short-cuts that might diminish program intent?

The influence of the corporate sector on new sources of money is not always positive. It's my understanding that two signs of change are troubling. Foundations giving to one another – Buffet to Gates-- being the most egregious example. And the “McKinsey mentality” of analytic bang for the buck. Open Society issues do not always find an easy framework in this tendency. I'd be curious if others agree with me.

STRATEGIC OPPORTUNITIES FUND

The framework and strategic plan is a valiant effort to make coherent a concept that perhaps should be more incoherent. How to be fair without being overly-bureaucratic? How to turn on a dime with or without R&D investment? The issues

seem undeniable although I'd like to hear more about the role of arts and culture in advocacy. And I can't believe that there are no other foundations that could take on the problems with No Child Left Behind.

I would like to know whether OSI has ever considered addressing the rise of the militia mentality in the American body politic. And in particular the violence against abortion providers? Abortion is often the canary in the coal mine – as a focal point for what we politely call “extremists”.

Finally, it was gratifying to see the phrase “women's rights” in the Democracy and Power materials. But I couldn't find it anywhere else.

Again, thanks to you both for all these materials. I will certainly try to extend my reading to all the other programs as much as I can.