

U.S. Programs 2011 Staff Retreat

December 9, 2011 – Desmond Tutu Center, New York

Retreat Goals:

- Reconnect, re-energize and strengthen professional and personal relationships
- Reflect and learn from each other’s experience, successes and challenges
- Create a vision for a healthier work environment in USP

Feel free to dress casually

Notepads and pens will be provided

Thursday, December 8		
Time	Activity	Notes
6-8pm	Optional USP Staff Dinner At Co. 230 Ninth Avenue (and 24 th St) New York, NY 10001 http://www.co-pane.com/index.php	Social, no activity Co. is a fantastic pizza place in Chelsea. Dinner will be covered by OSF. This activity is optional and will not count as overtime.
Friday, December 9 – Desmond Tutu Center		
180 10 th Avenue, New York, NY 10011 (between 20-21 st streets). Conference center’s main phone is 212.929.3888, and website is https://www.tutucenter.org/ . The nearest trains are the C/E at 23 rd or the 1 at 23 rd . Exit either train station and walk north-west.		
8am	Continental breakfast available	Social, no activity
9 - 9:10am	The “Time Capsule” A time capsule is a personalized memento meant to preserve a memory or piece of history in time. We want to invite everyone to help build our own USP time capsule – a mural that will capture, link and help to contextualize our work and time in the history of OSF (and why not, the US and the world!) for our enjoyment, perplexity, astonishment or amusement and/or that of future generations of USPers. We will have markers, paint supplies, glitter, stencils, a polaroid camera or two, and other art materials on hand for staff to use. If at any moment during the retreat staff feel inspired, they should feel free to walk over and contribute to this effort.	Susan, Michael S.
9:10 - 9:30am	Welcome Agenda overview & Working agreements	Diana Laleh
9:30 – 10:20am	USP Bingo	Patricia
10:20 – 10:40am	Break	

10:40am – 12pm	<p>Morning Peer Discussion Sessions (concurrent) <i>See below for a description of the sessions</i></p> <ol style="list-style-type: none"> 1. Social Justice Philanthropy (convener: Tom) 2. Building a Culture of Mutual Funder-Grantee Accountability (conveners: Lorraine, Heddy, Adam) 3. Fundraising for Social Justice (convener: Tricia) 4. The Why’s and How’s of Blogging and Tweeting (convener: Maria) 5. Addressing Change through Arts and Crafts (convener: Kima) 	
12 – 1pm	Lunch	Social, no agenda
1 – 2pm	<p>Afternoon Peer Discussion Sessions (concurrent) <i>See below for a description of the sessions</i></p> <ol style="list-style-type: none"> 1. Grassrooting the System: The Development and Impact of Social Movement Philanthropy, 1953-1990 (convener: Tom) 2. Funding City and National Advocacy Campaigns (convener: Terrence) 3. Making Waves for Change (convener: Erlin, Debra) 4. The OWS Movement (convener: Patricia) 5. Addressing Change through Arts and Crafts (convener: Kima) 	
2 – 2:10pm	Break	
2:10 – 3:45pm	<p>Sustaining Yourself in the Work: the Role of a Healthy and Inspiring Work Environment</p> <p>A “healthy” work environment is one that encourages and supports people to perform at their best; that enables staff to accomplish goals faster and easier, with less stress and more enjoyment; that makes the most of people’s talent, wisdom, creativity and time; and nurtures health, focus, mood and energy.</p> <p>During this session, we will craft a vision and roadmap to create and maintain a healthy, balanced, nurturing and productive work environment.</p>	<p>Raquiba, Kima, Michael F.</p> <p>Big and small group work</p>
3:45 – 4:15pm	<p>Closing activity: Movie Time</p> <p>The past year within USP has had all the makings of a compelling storyline—a colorful cast of characters, drama, suspense, intrigue... At times, these facets of daily life have collided head-on, playing out like a mini-soap opera – or even a suspense thriller – shrouded in mystery, with the stakes high and a cliffhanger of an ending. At some point staff must have thought to themselves: “Gosh...If made into a movie, what actor/character (fictional or non-fictional) would I like to see play me in a movie about the past year in USP?”</p>	Michael S.
4:15 – 4:30pm	Next Steps & Closure	Eric

PEER DISCUSSION SESSIONS

Session 1: Funding city and national advocacy campaigns

Convener: Terrence Pitts

- * Using convenings as a tool to assess campaign feasibility and working with the field to jumpstart new campaigns;
- * Funding models - working with other funders to collaboratively fund campaigns;
- * Campaign infrastructure - what infrastructure makes sense and what is the role of philanthropy in supporting the campaign infrastructure;
- * Challenges and benefits of funding campaign-based advocacy.

Session 2: "Social Justice Philanthropy"

Convener: Tom Hilbink

Discussion of what we each mean (and what we mean as a foundation) when we say we do "social justice philanthropy." Background reading: report from the Working Group on Philanthropy for Social Justice and Peace. http://www.p-sj.org/files/Social%20Justice%20Philanthropy%20Traditions_0.pdf

Session 3: Discussion of "Grassrooting the System: The Development and Impact of Social Movement Philanthropy, 1953-1990"

Convener: Tom Hilbink

It could give us grounding for thinking about funding campaigns, social movements like OWS, and other work we are doing. Background reading: 37 page academic article that looks at the history of foundation funding for social movements.

Session 4: Using Social Media to Support our Work: The Why's and How's of Blogging and Tweeting

Convener: Maria Archuleta

Session 5: The OWS Movement

Convener: Patricia Jerido

Occupy Wall Street has changed the political and cultural atmosphere in the U.S. in the past two months. OWS has captured the attention of new and seasoned activists, the media, politicians, established non-profit and labor organizations as well as Disney pop princess, Miley Cyrus, in her latest video, Liberty Walk, dedicated to OWS. See here: <http://www.youtube.com/watch?v=Ovs0fpFgegq>

In this moment, and not as a direct link to OWS, we've also seen some surprising shifts recently:

- * The defeat in Congress of the constitutional amendment for a balanced budget. This was considered a done deal earlier this year.
- * The failure of the Super committee to further cut services and increase tax cuts. This failure now has military spending on the table for possible cuts.
- * The coordinated action of close to 1 billion dollars moved out of private banks by individuals.

This session will allow time for discussion for the following items:

- * How has OWS changed the conversation in the fields in which you work?
- * How have our expectations of what is possible changed?

- * What are our grantees with demands seeing as opportunities in this moment?
- * What are our impressions of the work of OWS and this moment?

Session 6: Fundraising for Social Justice

Convener: Tricia Rubacky

How is the economy impacting fundraising for social justice organizations? How could OSI staff can be helpful to our grantees in this context beyond making our grants? What is the day-to-day reality in Development offices of our grantees in 2011? Is this a concern of OSI or not? If so, how much of a concern. If not, could it take on greater importance/emphasis in 2012 when times will still be rough?

Session 7: Building a Culture of Mutual Funder-Grantee Accountability

Conveners: Lorraine, Heddy, Adam

In this conversation, we will explore how, as funders, we can build and model a partnership with our grantees where we are mutually accountable to the social justice goals we are trying to advance. What does it mean to be accountable to our grantee partners and the broader communities that they work with? When we ask our grantees to be accountable to us and their constituencies - how can we also be accountable to them? How can we be more transparent & accessible to the broader fields and communities that our grantees work in? How can we best support movements and communities in need of funding to advance goals we share with them? In what ways are USP staff already engaged in building these partnerships? What best practices can we share with each other? What are models and best practices for accountability from other foundations can we learn from? These can include different models for decision-making, methods and metrics for evaluating grantees, asking for grantee evaluations of funder work, and more.

Session 8: Addressing Change through Arts and Crafts

Convener: Kima

The single greatest constant in the life of a foundation is, perhaps, change. Strategies, issues, staff, leadership, and available resources all change over the life of any foundation, and this has certainly been true for an organization as dynamic as OSF. While change represents opportunity, it is usually also a source of stress. How do we sustain ourselves so that we don't burn out and we can continue to do the work that needs to be done? Come prepared to engage in some hands-on fun, creative work, and to share an anecdote, a technique, a resource that you have in your own life about how you deal with the stress of change (or work in general!) and what you do to take care of yourself.

Session 9: "Making Waves for Change"

Convener: Erlin, Debra

"It is in creative imaginings of those bearing witness to injustice that gives emotional and spiritual meaning to the historical moment". This session aims to explore:

- * Examples of "creative imaginings" that are part of modern day social justice movements
- * Our understanding of the role of cultural and artistic expression in the fields that we support
- * What we can learn from global movements where art and culture have been central to fueling and sustaining movements