Beyond Counting: A Journey Toward Equity at the W.K. Kellogg Foundation

A foundation committed to equity and the eradication of structural racism broadens its views on diversity and inclusion.

Established in 1930 by breakfast cereal pioneer W.K. Kellogg, the foundation that bears his name has had an eye on equity from the beginning. Chartered for the purpose of administering funds to benefit children "without regard to sex, race, creed, or nationality," the W.K. Kellogg Foundation (WKKF) has stayed true to its founder's original intent. At the same time, the organization has worked to continually advance its understanding of the barriers to equity and their impact on children and to evolve its programming to "remain innovative and responsive to the ever-changing needs of society."[1]

In 2010, WKKF launched a five-year, $75 million initiative called "America Healing" with the goal of improving "life outcomes for vulnerable children and their families by promoting racial healing and eliminating barriers to opportunities."[2]

Challenge

Charged by its board of trustees "to strive to be the most effective antiracist organization we could be,"[3] the W.K. Kellogg Foundation had already been through "at least two generations of diversity training," when Sterling Speirn became president and CEO in 2006. "We had been working with the Diversity Advisory Committee and with a healing-racism approach to training and experience," Speirn explains. "We're very committed to this as an organization, but the work is never done—there are always new frontiers of experience and learning."

For Speirn and the WKKF staff, one of those new frontiers has been the Peer Action Learning Network (PALN) developed by the Council of Michigan Foundations (CMF).

PALN MERGES DIFFERENT BODIES OF THOUGHT—LEADERSHIP WORK, INTERCULTURAL WORK, ORGANIZATIONAL WORK, AND WORK AROUND POWER AND RELATIONSHIPS—TO PROVIDE NEW TOOLS, NEW AWARENESS, NEW INSIGHTS ON THE JOURNEY. —Sterling Speirn, president and CEO

Sterling Speirn

A co-chair of the advisory committee for CMF's initiative for Transforming Michigan Philanthropy through Diversity and Inclusion (TMP), Speirn recalls when the idea for an expert-led peer-learning program that would provide a safe space for candid conversation about diversity and inclusion and for personal, team, and organizational development and transformation was "just a glimmer in people's eyes."

Four years later, WKKF is preparing to send its third team of management and staff members to participate in PALN.

One in a series of case studies developed by the Council of Michigan Foundations (CMF) to share the experiences and learnings of member organizations at the leading edge of its Transforming Michigan Philanthropy through Diversity and Inclusion (TMP) initiative. These early adopters participated in CMF's Peer Action Learning Network (PALN), a yearlong, expert-led engagement program designed to strengthen participant foundations' capacity in diverse and inclusive leadership, management, and grantmaking. Additional TMP resources may be accessed at www.michiganfoundations.org.

Ali Webb

"I just can't praise the Council of Michigan Foundations enough for taking on the issues of diversity and inclusion—not easy topics in this country," says Speirn, a member of the first WKKF PALN team. "Their program merges different bodies of thought—leadership work, intercultural work, organizational work, and work around power and relationships—to provide new tools, new awareness, new insights on the journey."

Insight

Ali Webb, currently director of Michigan programs at WKKF, was a program officer at the time she joined the foundation's first PALN team. "It was a group you didn't say 'no' to," Webb remembers. "It was the CEO and the COO and the director of HR—quite a powerful group within the foundation, and one that I was eager to be part of.[4]"

Webb says she knew her team was committed to the year-long program when President and CEO Speirn changed his vacation dates in order to attend the first session. "The group expectation was that every member would attend every session, and we did a really good job at that, which made it a very powerful and worthwhile experience for me." Webb says that the group—none of whom she worked with on a daily basis, and all of whom carpooled to the monthly sessions so they could use the time to prepare and debrief together—"was a fabulous part of the program for me. These people were very committed to the topic, and engaging with them allowed me to build some strength around race and inclusion issues—things that are not easy to talk about."

Early in the program, the PALN team and all WKKF employees took the Intercultural Development inventory (IDI)® assessment (see sidebar) and team members received their individual results profiles as well as group profiles of the team and the organization as a whole.

"I was really intrigued by this instrument that could accurately assess both your aspirations on the topic as well as the current place you are operating from," Webb says. "The IDI results gave the team some language to talk about where we were as a team and as an organization. That was hugely powerful."

The IDI findings indicated that, as an organization, WKKF was in the developmental stage called "Minimization"—or, as La June Montgomery Tabron, executive vice president for operations and treasurer, puts it: "right in the middle of the bell-shaped curve."[5] Organizations in Minimization (there are many) tend to downplay cultural differences and place an emphasis on "universal" behaviors and values.

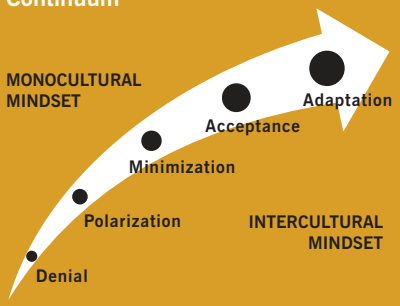
"What we learned was that we were using a sort of one-size-fits-all mentality," explains Tabron, a member of the first WKKF PALN team and a veteran of the foundation's decades of work around diversity and inclusion. "It was all well intended, but the tendency was to try to fit everybody into the same box."

For Sterling Speirn, the IDI® results came as something of a revelation. "At first I regarded the IDI as an interesting tool to analyze individual levels of cultural awareness," he says. "But when we got the organizational results, I thought: What a gift! What a gift to be able to say, 'We're an organization in minimization,' and to begin to understand the typical pitfalls or blind spots or strengths and weaknesses of that stage."

As team members worked their way through the PALN curriculum, they came to understand that, for all the foundation's intense focus on racial equity, they had been thinking about diversity from a "counting people" rather than a "people counting"[6] perspective.

INTERCULTURAL COMPETENCE

Intercultural Development Continuum



Based on a theoretical framework developed by communications studies professor Milton Bennett, the Intercultural Development Continuum (IDC) provides a helpful graphic guide to the ways individuals think about and respond to cultural differences. Five stages, plotted along a continuum from "Denial" to "Adaptation," depict an increasingly complex understanding of cultural differences. Each stage is linked to a specific set of behaviors displayed when individuals and organizations interact with different demographic groups.

Bennett identified the earlier stages as "ethnocentric," relating to a *monocultural mindset* that avoids dealing with cultural difference by denying its existence, raising defenses against it, or minimizing its importance. As people grow in intercultural competence, they move into the "ethnorelative" stages of an *intercultural mindset* which actively seeks out cultural difference, accepts its importance, and adapts behavior in response.[7]

The Intercultural Development Inventory (IDI) is an assessment tool that measures orientation to cultural difference to identify the current developmental level of an individual, group, or organization on the IDC continuum. Now used in corporate, government, nonprofit, and education settings around the world, the IDI is widely accepted as a reliable and valid measure of intercultural competency.

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"It was like, 'Wait a minute,'" Speirn says. "'We really want to hire people who are different, so when they get here we don't want to try to make them all the same—to have a culture where, yes, people look different, but we expect them to all act the same.'"

YOU COULD HAVE A DIVERSE BOARD AND A DIVERSE STAFF, AND STILL NOT HAVE AN EQUITABLE ORGANIZATION. THE NOTION OF INCLUSION OF DIFFERENT VOICES GOES BEYOND SIMPLE COUNTING. —Ali Webb, director of Michigan programs

Webb recalls a PALN seminar where the equation Diversity + Inclusion = Equity was presented for discussion. "This gave us a bigger theoretical basis for thinking about what equity really looks like in the world," she says. "We had gotten stuck on the diversity piece: how many of what kind of people do you have? For me, the learning was that you could have a diverse board and a diverse staff, and still not have an equitable organization. The notion of inclusion of different voices goes beyond simple counting."

Strategy

Each PALN team focuses on an "Action Learning Project" in which the participants use their new intercultural insights and skills to tackle an organizational learning objective.

Tabron says that she found this aspect of the PALN program especially valuable. "The project we took on was something that was really needed by the organization, and this gave us time and a way to plan together," she explains. "I liked that it was seeded in real work, that it wasn't just theory that you had to figure out how to integrate back into your day-to-day work."

Tabron and the team developed an action project that would address problems that employees were having with "connecting the dots" among the various initiatives WKKF had introduced to build awareness around the issues of diversity and racial equity. "People would attend an event and find it individually useful, but were beginning to wonder how it all added up. 'What is it we're trying to achieve, and how does my participation in this event connect to the previous event or to the new policies and procedures we've launched in this space?'"

The PALN team responded with a strategy that included having every WKKF employee take the IDI assessment and learn about the Intercultural Development Continuum. Then they worked together to create a presentation that would "anchor the entire organization" with a common language with which to "connect the dots."

"What we've been trying to do all these years is bring information to the organization that would help people use a more critical lens to understand intercultural situations and not just unconsciously react and respond," Tabron says. "I believe that the IDI tool was very effective in helping people gain more awareness and then finding practical applications for that awareness. It helps people think on a daily basis about how they usually respond, and how they could make a decision to do something different, to make a better choice."

Results

The PALN team completed its learning project by presenting a workshop on "Diversity, Inclusion & Equity at WKKF" to every functioning unit in the organization. Follow-up surveys indicate that employees found the presentation helpful in understanding the connections among racial equity programs and policies and why the work is important to the foundation's mission.

This is just one of many ways that the first WKKF PALN team brought their new intercultural competency awareness and skills back to the foundation. Tabron says that her initial hope that the learnings could be "cascaded" through the organization has been fulfilled. "It's been very beneficial for us internally as a way of helping people understand themselves, where they are in their learning, and what specific goals or targets they could pursue in order to progress."

Webb says that there were many instances in which she was able to bring her PALN skills and experiences back to her Michigan program team at the foundation. "There was a lot in the content of the program that was directly applicable to challenges we were facing with our programming," she explains. "The Diversity + Inclusion = Equity model, for instance, gave me a language and a path that I could use to guide my team and that they could use in their interactions with our partners. We started asking things like, 'Who is making the decisions in these nonprofit organizations? Do they look like the populations they're serving? And if we can get them to Diversity, can we help move them through Inclusion, to Equity?'"

WKKF PALN team

La June Montgomery Tabron

As a result of the first WKKF PALN team's work, their colleagues on the second team began with a helpful awareness of the foundation's Minimization orientation. They developed their Action Learning Project around revamping a major customer service initiative that was about to be launched because they recognized ways in which the training curriculum failed to take cultural differences into account.

For example, "go direct," one service standard promoted by the training, encouraged employees to address misunderstandings with direct and immediate communication. "We were saying that to go direct, to take care of issues immediately, was a good behavior," Tabron explains. "As we viewed that through an intercultural competency lens, though, we realized that different cultures are not comfortable going direct. In fact, it's a sign of disrespect and it's something that they would never do. We were trying to measure everyone by our Western cultural standard of feeling comfortable confronting people face to face."

In the end, the entire training program was rewritten to eliminate "go direct" and other service standards that ignored cultural differences, and Tabron reports that the new program has been well received. "We've gotten great preliminary results from it," she says.

Today, an introduction to the IDC and individual IDI assessments are part of the foundation's on-boarding for all new hires. Speirn is pleased to report that the board of trustees has expressed an interest in learning about the developmental model and taking the assessment as well. He expects that the shared language of the IDI/IDC will help board and staff "collaborate on strategies and be more in alignment."

As director of Michigan programs, Webb has been actively promoting intercultural awareness and development training with WKKF grantees. The foundation recently funded the state's first employee climate survey as well as an intercultural competency training pilot. A team from the Michigan governor's office participated in IDI assessments and a workshop sampling of the PALN curriculum which Webb believes will "have a huge impact on their governing... something that never would have happened if I hadn't personally been exposed to the IDI and its developmental model."

Moving Forward

Two years after their first assessment, the people at WKKF took the IDI again. Tabron was delighted to learn that "we *had* progressed—we had moved out of the middle of that bell-shaped curve and into a place of acceptance. I think it really proves the premise that we've held all along—that while awareness is not totally curative, it is certainly helpful in creating change."

WE HAD PROGRESSED—WE HAD MOVED OUT OF THE MIDDLE OF THAT BELL-SHAPED CURVE AND INTO A PLACE OF ACCEPTANCE. —La June Montgomery Tabron, executive vice president for operations and treasurer

"I'm really excited to see evidence that we have moved as an organization, that people are gaining new awareness," Speirn says. "I am also very humble about what it takes to really adopt new behaviors, and I think we still have a long way to go. It's a life-long journey."

WKKF will be sending a third team to PALN this year. Speirn says that the program's "rewards to our foundation have been great, and they have been multidimensional. The benefits that come out of this work are individual as well as organizational." Thinking about the foundation's mission to create "an environment in which vulnerable children are protected, nurtured, equipped, and stimulated to succeed,"[8] he muses: "It would be great if people had these insights very early in their lives, if we could begin to build these intercultural skills in early childhood. Because skills beget skills, and that's how transformation happens."

LESSONS FOR SUCCESS

Accept where you are as an organization. The IDI results profile may be sobering, but it is reality. It's where you have to start.

Don't expect people to change overnight. The journey takes time. Be persistent.

Accommodate different learning styles. People come to understanding in their own ways and on their own timetables.

Don't judge. People have their own legitimate starting points, based on their own personal histories and experiences.

Endnotes

1 W.K. Kellogg Foundation. “Our History in Grantmaking.” Accessed 5/16/2013. http://www.wkkf.org/who-we-are/our-history.aspx

2 Muhammad, N. “Long-term effects of systemic racism examined.” The Final Call. May 21, 2010. http://www.finalcall.com/artman/publish/National_News_2/article_6987.shtml

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