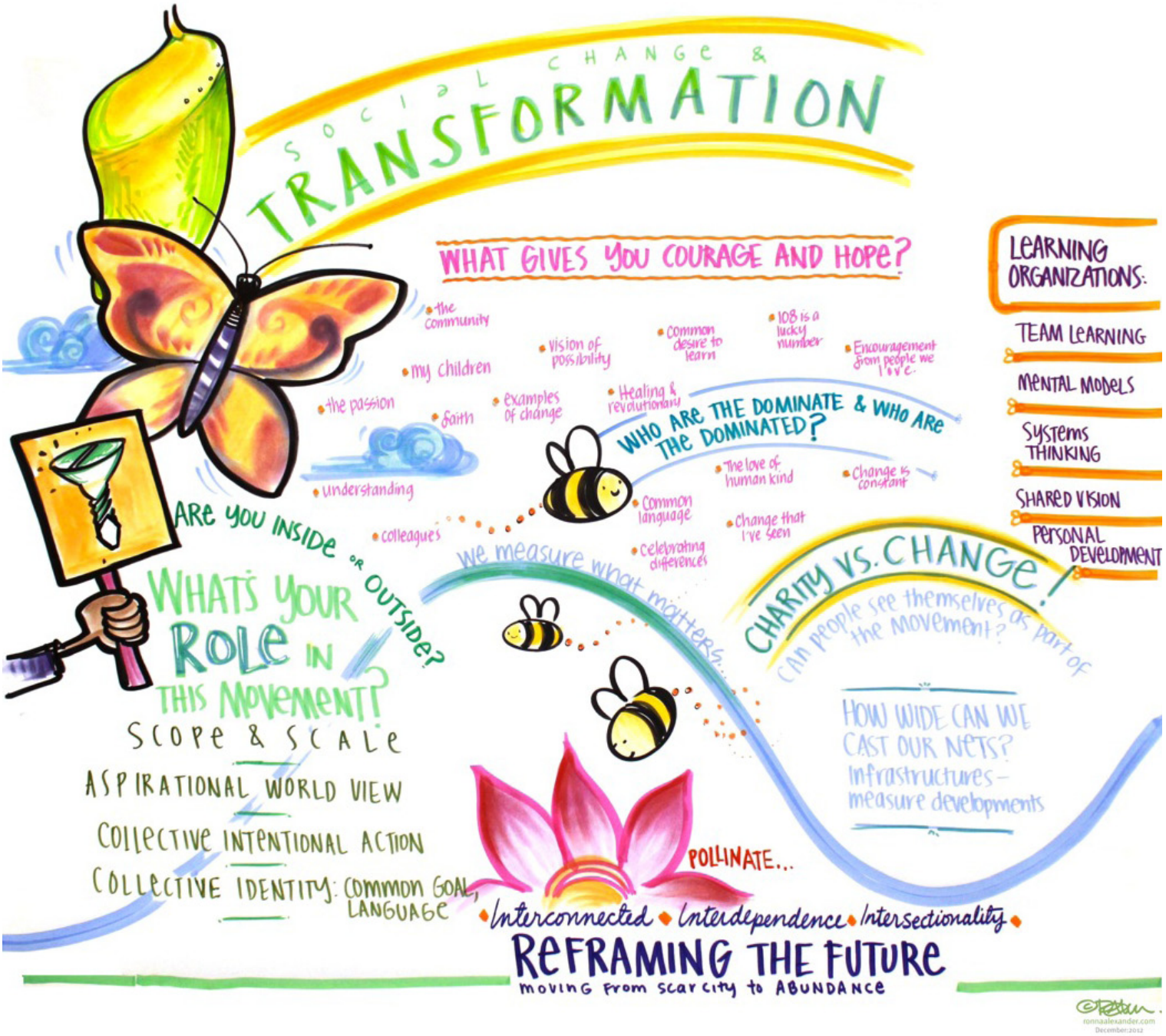
TRANSFORMING MICHIGAN PHILANTHROPY THROUGH DIVERSITY AND INCLUSION

LEARNING TOGETHER:

The Peer Action Learning Network for Diversity and Inclusion

STORIES OF CHANGE



CMF COUNCIL OF MICHIGAN FOUNDATIONS

ABOUT THE TMP INITIATIVE

Launched by CMF in 2008, Transforming Michigan Philanthropy through Diversity and Inclusion (TMP) was conceived as a catalyst for social change that would transform Michigan communities by increasing the effectiveness of organized philanthropy in our state. It is the only comprehensive, statewide effort to promote diversity and inclusion among foundations.

The initiative's original objectives called for:

- CMF to become a diverse and inclusive membership organization.
- Increasing member awareness and understanding of diversity and inclusion, and supporting voluntary action to become more diverse and inclusive.
- Increasing the diversity of individuals serving, leading, governing, and advising foundations and corporate giving programs.

An advisory committee consisting of trustees, CMF members, and partners from Michigan foundations and organizations provides guidance for the TMP initiative, which is supported by grants from the Arcus, W.K. Kellogg, Kresge, Charles Stewart Mott, and Skillman foundations.

Additional TMP resources, including findings on Michigan foundations' policies and demographics, may be accessed at www.michiganfoundations.org.

Support for the TMP initiative has been provided by the Arcus Foundation, The Kresge Foundation, W.K. Kellogg Foundation, C.S. Mott Foundation, and The Skillman Foundation.

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FOREWORD

In 2008, when we decided to name our new diversity and inclusion initiative "Transforming Michigan Philanthropy" (TMP), we knew the title was a bold statement of our intention. *Transformation* was, admittedly, a rather audacious goal for a relatively small, regional membership organization to take on.

But five years into this unique experiment in social change, evidence shows that members are achieving new levels of commitment and making significant changes in diversity, equity, and inclusion internally, in their work in communities, and in their grantmaking.

This report shares the experiences of a group of "early adopters" from within CMF's membership—Michigan foundations that have been deeply involved in efforts to transform their organizations' internal cultures, policies, and practices, as well as their engagement with community stakeholders and partners. These leaders in advancing diversity and inclusion within the philanthropic sector all participated in TMP's Diversity and Inclusion Peer Action Learning Network (PALN).

An expert-led peer learning program designed to build knowledge and skills in interculturally competent leadership, management, and grantmaking, PALN is currently enrolling its fourth cohort of teams representing family, community, and private foundations from across the state. Over the past three years, PALN has engaged CEO-led teams from eight foundations, as well as CMF and the Michigan Nonprofit Association, in a year-long immersion curriculum. Several organizations have sent teams every year.

Preliminary research findings[1] show that the organizations featured in this report have made measurable progress toward increasing their awareness of cultural differences and improving their skills of acceptance and inclusion of diverse demographic groups.

Perhaps even more persuasive than numbers, however, are the stories shared here by individuals who have participated in PALN and gone on to apply their new understanding and capabilities "on the ground." In interviews conducted during the summer of 2013, committed CEOs, vice presidents for programs, program and development officers, and other staff members from the Grand Rapids Community Foundation, the Kalamazoo Community Foundation, the W.K. Kellogg Foundation, and the Skillman Foundation talked openly—and often passionately—about the personal and organizational insights, changes, and challenges they experienced during, and as a result of, their PALN involvement.

Their reports from the frontline of a growing movement for diversity, inclusion, and—ultimately—equity in Michigan foundations and the communities they serve offer help and inspiration to other foundations working to create an inclusive culture within their organizations and in their relationships with donors and grantees.

Robert S. Collier
President & CEO
Council of Michigan Foundations

Vicki J. Rosenberg
Former Director and Consultant, Transforming Michigan Philanthropy Through Diversity & Inclusion
Director, Peer Action Learning Network
Vicki Rosenberg & Associates

1 Structure and Purpose of the TMP PALN

When the TMP initiative was officially launched at a Detroit symposium co-hosted by CMF and the Diversity in Philanthropy Project, participants requested that CMF provide them with an expert-led peer learning program that would provide a safe space for candid conversation about diversity and inclusion, and a curriculum that would result in individual, team, and organizational transformations.

After extensive research, CMF invited Beth Zemsky (an expert in social movement building, intercultural competency, and systems change) and Dr. Lynn Perry Wooten from the Ross School of Business at the University of Michigan (an expert in organizational strategy and culture) to design and serve as lead faculty for the Peer Action Learning Network (PALN) on diversity and inclusion.

PEER LEARNING

"Organizational excellence through diversity and inclusion requires an organization to find a goal that resonates with its stakeholders and then create collaborative communities that focus on achieving that goal." —Lynn Perry Wooten

Peer action learning networks, also known as "learning communities," first emerged in the early 1990s in response to a new understanding of learning as a social process in which people gain knowledge from interacting with each other and through active practice.

Peer learning groups are made up of "practitioners sharing a common concern or question, who deepen their knowledge and experience on a given topic or practice by learning together on an ongoing basis as they pursue their work."[2]

Researchers have found that these groups can significantly amplify conventional learning practices when:

- Peers learn from each other and from outside experts.
- Peers generate new learning by actually being together.
- Peers work on a specific project with a deliverable that will also advance their own work.

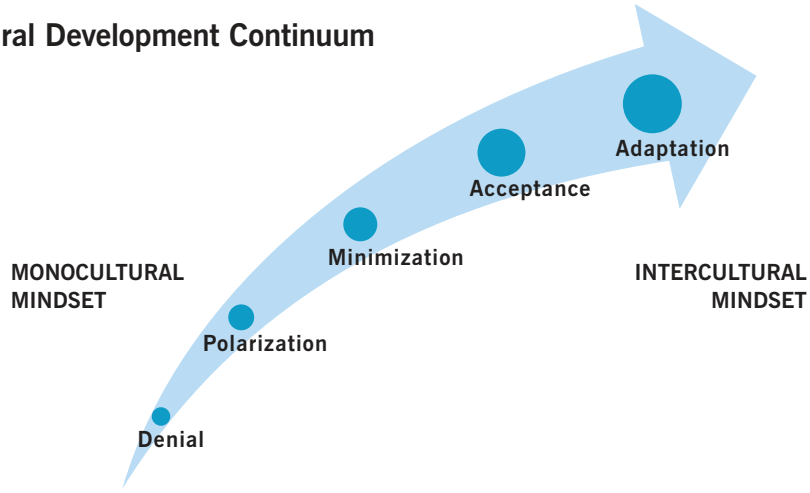
The program is built around a series of six day-long seminars offered throughout the year. The seminars integrate a mix of teaching styles including presentations, group exercises, small and large group discussions, and other activities. Participating foundations send teams of five or six individuals who typically include the CEO or other executive leaders. Between meetings, teams complete action learning projects based on actual work responsibilities and receive monthly coaching support to achieve their learning goals.

Before the first seminar, PALN participants complete baseline Intercultural Development Inventory (IDI)® assessments to measure the "intercultural competence" levels of individual team members, the team as a group, and their organizations. Each year, faculty customize the curriculum based on the class aggregate score, to ensure that the material is developmentally appropriate.

Based on their IDI profiles, which present information on how respondents make sense of and react to cultural differences, each team works to set learning objectives at the individual, team, and organizational levels. Faculty work with both individuals and teams to develop understanding and skills that will help them move to the next stage of intercultural sensitivity as outlined by the Intercultural Development Continuum (IDC)®.

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.[3]

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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2 Challenge

The foundations CMF invited to participate in its charter PALN program were selected based on their demonstrated commitment to pursuing diversity and inclusion in their hiring and grantmaking practices. The organizations represented in this report all began their PALN experience with solid reputations regarding their interest in, and pursuit of, equity.

W.K. Kellogg Foundation (WKKF)

A long-time sector leader in efforts to understand and pull down the barriers to equity, especially as they affect children, WKKF has continually evolved its programming to "remain innovative and responsive to the ever-changing needs of society."[4] 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."[5]

Charged by its board of trustees "to strive to be the most effective anti-racist organization we could be,"[6] 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."

In 2011, Speirn, who had served as the advisory committee co-chair for CMF's Transforming Michigan Philanthropy through Diversity and Inclusion (TMP) initiative, decided to take a WKKF team to PALN to explore those new frontiers. He says that he was intrigued by the way the "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."

Grand Rapids Community Foundation (GRCF)

Under the 25-year tenure of its current president, Diana Sieger, GRCF has become known for its efforts to ensure that its policies and programming are welcoming to and reflective of the increasingly diverse Grand Rapids community.

In 2009, when GRCF staff members learned about an accreditation program called Partners for a Racism-Free Community (PRFC), they became determined to attain the coveted status of "racism-free organization.[7]"

That same year Sieger, a charter member of the advisory committee for the TMP initiative, heard about PALN. Intrigued by the program's proposed curriculum and its emphasis on intercultural competency as a means of transforming philanthropic organizations and their grantmaking, Sieger says, "We just jumped at the chance"[8] to participate.

Kalamazoo Community Foundation (KCF)

Recognizing that the community it serves "draws its spirit, vitality, and character"[9] from an increasingly diverse population, KCF emphasizes the importance of diversity and inclusion by including it as a core organizational value.

In 2010, the foundation's board of trustees passed a resolution to declare KCF an anti-racist organization, committed to eliminating the structural racism that "perpetuates the inequalities that threaten the well-being of our community."[10] Working with a local group[11] whose mission is to eliminate racism in Southwest Michigan, KCF management and staff have all participated in training designed to "develop a shared understanding of systematic racism across all levels of the institution."

That same year, Carrie Pickett-Erway, KCF president and CEO, joined the first PALN team in the position she held then, senior community investment officer. During a period that saw transitions in four of six leadership positions at the foundation, including CEO, Pickett-Erway says that participation in PALN has played a constant and expanding role in the community foundation's exploration of diversity and inclusion.

STORY OF CHANGE

Walking the Talk: CMF in PALN

As part of its effort to fulfill the first objective of its TMP initiative, "become a diverse and inclusive membership organization," CMF has sent teams to three consecutive PALN sessions.

According to the 2012 evaluation report prepared by the Johnson Center for Philanthropy, PALN participation has contributed to positive changes in CMF policy and practices.

"In 2011, CMF used the Peer Action Learning Network team project to revise their performance-review process to make the rating systems more equitable. Their continuing progress through 2012 included incorporating diversity and inclusion into their performance reviews, training staff on how to do employee reviews, and getting feedback from staff on recruitment and hiring practices."

The study concludes that "CMF as an organization has embraced the importance of diversity and inclusion, and in 2012, has made important changes to its internal structure" to "better serve its members and to change organizational and board culture."[12]

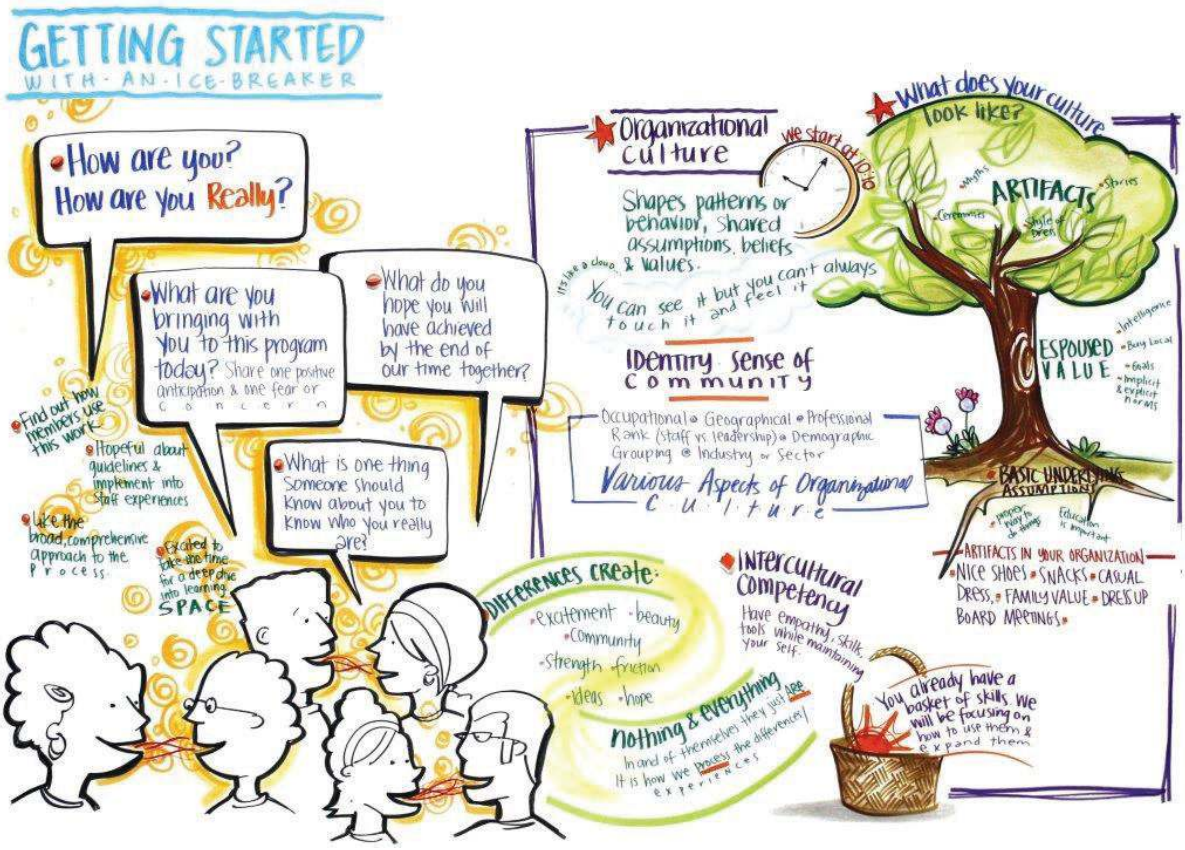
3 Insight

The results of the initial IDI assessments administered at the beginning of their PALN experience showed that, at the organizational level, all three foundations were in the Minimization stage on the IDC.

Research suggests that Minimization is a kind of transition state between monocultural and intercultural mindsets.[13] Milton Bennet, the originator of the developmental model, writes that while Minimization is "theoretically" monocultural—because people in that stage experience everyone as essentially similar in ways that are explained by their own cultural beliefs—"the experience also includes the ability to perceive some cultural differences in largely non-stereotypical ways and to recognize the essential humanness of others."[14]

Like many organizations "in the middle," KCF, GRCF, and WKKF have strong and long-term commitments to advancing diversity and inclusion and have invested time and money in training programs designed to combat racism and other forms of discrimination. The Minimization identification is not always easy for organizations like this to accept at first.

Pickett-Erway remembers some "initial disappointment" with KCF's results: "We were an organization that had done a lot of thinking and had really good intentions around diversity and inclusion," she recalls. "We expected our results to be 'better' than they were."[15]



STORY OF CHANGE

Recognizing Minimization: Revising a Training Program at WKKF

La June Montgomery Tabron, executive vice president for operations and treasurer, says that once an organization understands the concept of Minimization, it can be vigilant about looking for its effects everywhere.

"We were about to launch a new service initiative," she recalls. "We were really seeking to change the culture in the organization around service delivery to our grantees and partners and responsiveness for all of our work. But as we were reviewing the content of the training material we were going to launch as part of the service initiative, we realized, 'Here we are. We're doing it again. We're perpetuating Minimization behavior.'"

As an example of ways in which the proposed service training minimized cultural differences, Tabron offers the "go direct" standard, which encouraged people 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 service training program was rewritten to eliminate "go direct" and other service standards that ignored cultural differences. Tabron reports that preliminary feedback on the new training has been very positive, and says that WKKF will continue to examine its training and service delivery models for ways to surface different perspectives.

WKKF's executive vice president for operations and treasurer, La June Montgomery Tabron, acknowledges that the IDI results profile can be "sobering, but it is reality. It's where you have to start."

"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 Speirn, the IDI results came as something of a revelation. "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 the WKKF team worked its way through the PALN curriculum, it became evident 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" perspective.

"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.'"

Sieger reports that at GRCF, "even though we thought we were quite advanced—from the standpoint of grantmaking and the groups we were focusing on in terms of development and donor relations—the IDI demonstrated to me that we had work to do."

Sieger's understanding of her own individual IDI results, which placed her one stage further along the continuum at "Acceptance," gave her new insight into her role as a leader. "I realized I had to be careful about coming off as preachy," she says. "I need to understand where people are at, what's going on their world, and come at it that way."

Other PALN participants also noted ways in which their individual IDI assessments helped them to be more understanding of others—and forgiving of themselves.

"The assessment helped me understand why some of my perceptions were what they were," explains Marilyn Zack, GRCF vice president of development, and a member of the inaugural PALN team. "It was all part of my background and upbringing and the whole package that is me. That sort of gave me permission to feel okay about myself—not that I didn't have some work to do, but that I could stop beating myself up about it. I recognized that [intercultural competence] is something you have to individually question and push forward. It's only through that process that you're going to get where you want to go."[16]

> "PALN helped me understand that we all have a culture that informs the way we see the world."

"We really didn't know what it meant, at first, to be 'in Minimization,'" says Susan Springgate, chief financial officer for KCF and a member of its first PALN team. But after a private consultation with PALN faculty to review her individual IDI results, she began to understand her own cultural perceptions in a completely new light. "As a person of blended European descent, I had never thought of myself as *having* a culture," she says. "PALN helped me understand that we all have a culture that informs the way we see the world."

"What we really appreciated about the individual assessments and consultations was that each person receives specific action steps they can pursue to move their intercultural competency in a positive direction," says Pickett-Erway. "To have that kind of interpretation and professional development coaching along with an assessment is just invaluable. Too often we're assessed and given a datapoint, but not really told what it means or how to improve it."

Pickett-Erway also notes that the PALN faculty worked with KCF staff to understand the foundation's collective IDI results and that a deeper understanding of what it meant to be an organization "in Minimization" helped "us use that as a datapoint for our growth going forward. Recognizing that we were actively doing things to move that score helped us be at peace with what it really was."

4 Strategy

Milton Bennett writes that the central developmental task of an individual or organization in Minimization is cultural self-awareness, "the ability to experience culture as context. Only when you see that all your beliefs, behaviors, and values are at least influenced by the particular context in which you were socialized can you fully imagine alternatives to them."[17]

"When people are in Minimization they're often incorporating information about other people through their own lens without even knowing that they're doing it," explains Beth Zemsky, who, along with Lynn Wooten, developed and presents the PALN curriculum. "They really need to learn more about their own cultural context to see how dominant culture expectations and values are built into organizational structures and become 'the way we do things around here.'"[18]

For teams that begin their PALN work in the Minimization stage, Zemsky and Wooten tailor the curriculum to help participants begin to see and understand their own cultural lens and the ways it is embedded in organizational policies and practices. "These organizations care about diversity and inclusion and may even recruit for difference," Zemsky says. "But they tend to hire for fit and onboard for assimilation."

Every PALN team develops and implements a year-long "action learning project" in which members collaborate to identify and solve a particular diversity and inclusion issue within their own organization. Learning projects for foundations in Minimization usually focus on examining a particular policy or process to understand its original intent and determine how well it is currently serving the organization's mission and goals.

Working on their Partners for a Racism-Free Community (PRFC) accreditation was a natural choice for GRFC's first action project. Jonse Young, director of philanthropic services, says it "helped us get through this very rigorous process," that "does not leave any stone unturned: policies, procedures, practices, vendor relations, publications. It was a lot of work, and PALN gave us a deadline and helped us get other staff members excited and involved."[19]

WKKF's Tabron says that she found the action learning component 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."

The first WKKF learning project was developed to address problems that employees were having with "connecting the dots" among the various initiatives the foundation had introduced to build awareness around the issues of diversity and racial equity. The PALN team responded with a strategy that included having every WKKF employee take the IDI assessment and learn about the Intercultural Development Continuum in order to "anchor the entire organization" with a common language with which to "connect the dots."

KCF's PALN work led the foundation to take a deeper look at its annual strategic planning process. Reviewing a summary report of a recent environmental scan prepared by internal staff, Pickett-Erway applied an "intercultural lens" and recognized that "we, as an organization, have a worldview that is reflective of who we are, and that may or may not be consistent with the community we serve. If we have a staff of middle-class, white individuals, the questions we ask, the opportunities we see, will be through the lens of that culture."

"The PALN curriculum helped us recognize our own worldview so that we could be really intentional about bringing in other perspectives to help us see what we can't see, ask questions we wouldn't know to ask," says Pickett-Erway. "So this time around, in addition to the research and analysis we've always done, we've gone outside the organization to ask some of our diverse community partners to take a look at our data and say: *What are we missing? What does this mean to you? Which of these things matter?"*

STORY OF CHANGE

Embracing Diversity of Thought (and Thinkers): The Skillman Foundation

With a mission to improve the lives of children in metropolitan Detroit, the Skillman Foundation has a strong commitment to diversity and inclusion, especially as they affect equal opportunity for disadvantaged children. When they joined CMF's Peer Action Learning Network (PALN) in 2011, they knew they were on the leading edge in Michigan philanthropy with regard to racial diversity and equity.

"As a foundation, we're very diverse," says Tonya Allen, CEO and designated president. "And we tend to be far more inclusive with our practices externally than most other foundations are. One of our core values is the inclusion of residents and youth in the development and implementation of strategy."

But when the Skillman team members reviewed the results of the Intercultural Development Inventory (IDI) assessment they took at the start of the PALN program, "We found that our idea of inclusion was a little limiting," Allen says. "There was an opportunity for more inclusion within our internal culture."

As they progressed through the PALN curriculum on interculturally competent leadership, the Skillman team members found themselves taking a broader view of what it means to be an inclusive organization. In particular, they began to see the need for "broader inclusion and respect for differing political opinions," according to Marie Colombo, director of evaluation and

learning, who joined Allen on the Skillman team. "The conversations at PALN made me much more aware of my and my colleagues' reactions to folks who hold different political and social views," she says.

For example, Allen explains, "I began to realize that our culture allowed for people to go on what I'd now call political tangents, although at the time I just thought of it as people expressing their perspective."

During the months of their PALN participation, Allen made a purposeful move to add a person whose views were "pretty conservative" to the foundation's programmatic team. "I wanted a diverse voice that would give us a more inclusive view of the issues, and it made me more aware of these kinds of lengthy tangents and how they might be affecting other people," she says. "It's not that we don't have conservative people here at the foundation, but it was not an inviting environment in which to express conservative views."

Allen says that she's made a conscious effort to change that by stopping "these kinds of discussions that are not contributing to an inclusive environment or advancing the conversation." She has come to see that creating a safe place for alternative opinions "makes for a more interesting and complex view of the world. We'll develop better strategies because of it."

Allen and Colombo say they now realize the importance of making space not only for diverse ideas, but also for diverse ways of *thinking* about ideas.

Colombo offers an example. "Our executive team is made up of people who are very driven, very ambitious, and extremely quick thinkers," she says. "It's a powerful leadership team, but we realize it needs to be balanced by the contributions of staff members of other personality types."

Before their PALN experience, Allen says, they might not have paid much attention to—or even noticed—that the executive team was made up of people who were very similar in certain influential ways. "But because I've become very conscious about having an environment that is reflective of multiple people's voices, it's really important to me that one personality type is not driving this organization in a way that prevents us from having an inclusive environment where people really believe that their voices are heard."

So, as part of her restructuring as she prepares to move into her position as president of the foundation, Allen has added another team to complement the quick-thinking, hard-driving senior management group. "It will broaden our leadership team so that we will have a different level of engagement and contribution and investment from different voices in the conversation," she says. "It's a structural way to try to achieve that balance."

Allen is hoping to send another Skillman team to the next PALN session. "PALN helped us work hard and thoughtfully about what it really means to be inclusive," she says. "It's informed our recent restructuring as an organization as well as our tolerance for having different political views or different ways of thinking within the foundation."

"We've always been diverse," Colombo says. "But it was a kind of binary diversity. Now I think our diversity is becoming far more dynamic. And I'm excited about what a dynamic organization we're becoming with different voices being heard."

5 Results

In February 2013, all PALN participants were invited to retake the IDI to assess their progress along the Intercultural Development Continuum. The results of their second assessments show that all participating organizations—including GRCF, KCF, and WKKF—moved their developmental orientation from Minimization to Acceptance.

"Acceptance of cultural difference is the state in which one's own culture is experienced as just one of a number of equally complex worldviews," Bennett writes. "People at Acceptance ... are adept at identifying how cultural differences in general operate in a wide range of human interactions."[20]

For many PALN participants, the experience has been transformative.

"PALN really helped me broaden my thinking about diversity and inclusion beyond even ethnicity, religion, sexual orientation, and the like, to include things like diversity of thought," says GRCF's Young. She recalls a particularly enlightening PALN exercise on the subject of "intent vs. impact."

"It happens every day: a person says something or does something and intends it one way, but the impact on the person on the receiving end is something very different," Young explains. "That has helped me so much. Because I *know* that the intent of anyone working at this community foundation is good. But in day-to-day activity, one can be misunderstood; the intention can be different than what the impact is."

Young says that the PALN curriculum "walked us through what to do when that happens, how to address it—that instead of taking a confrontational stance, we could say: 'Tell me more about that. Help me understand what you are thinking about that.' That puts you on an even par to begin to have a really healthy conversation."

Stephanie Carrier, community investment assistant and a member of KCF's third PALN team, says: "PALN helped me dig deeper into my identity and where I came from culturally. It was just an understanding I had to move through to get beyond that Minimization stage where you kind of whitewash everything, say, 'Everything's okay.'"[21]

STORY OF CHANGE

Building Inclusion through Conversation: Kalamazoo Community Foundation

When KCF joined PALN in 2010, their forward-thinking, comprehensive diversity policy had been in effect for over a decade. Among other things, the policy required grantees to sign an inclusion statement affirming that their organizations were open to all people "regardless of ethnicity, race, age, gender identity, sexual orientation, economic circumstances, physical and/or mental abilities, characteristics, philosophy, religion, or any other discriminatory reason."

In the spring of 2013, after three KCF teams had participated in the PALN program—and after extensive discussions with community partners affected by the inclusion statement—KCF made a small but significant change to that statement, inserting the words "wherever practical."

The intent of the addition was to be more inclusive of faith-based "organizations that felt excluded by our definition of 'inclusion,'" explains Suprotik Stotz-Ghosh, vice president, community investment. "We're trying to create a place where everybody has access, and we know there are institutional practices that get in the way of that."

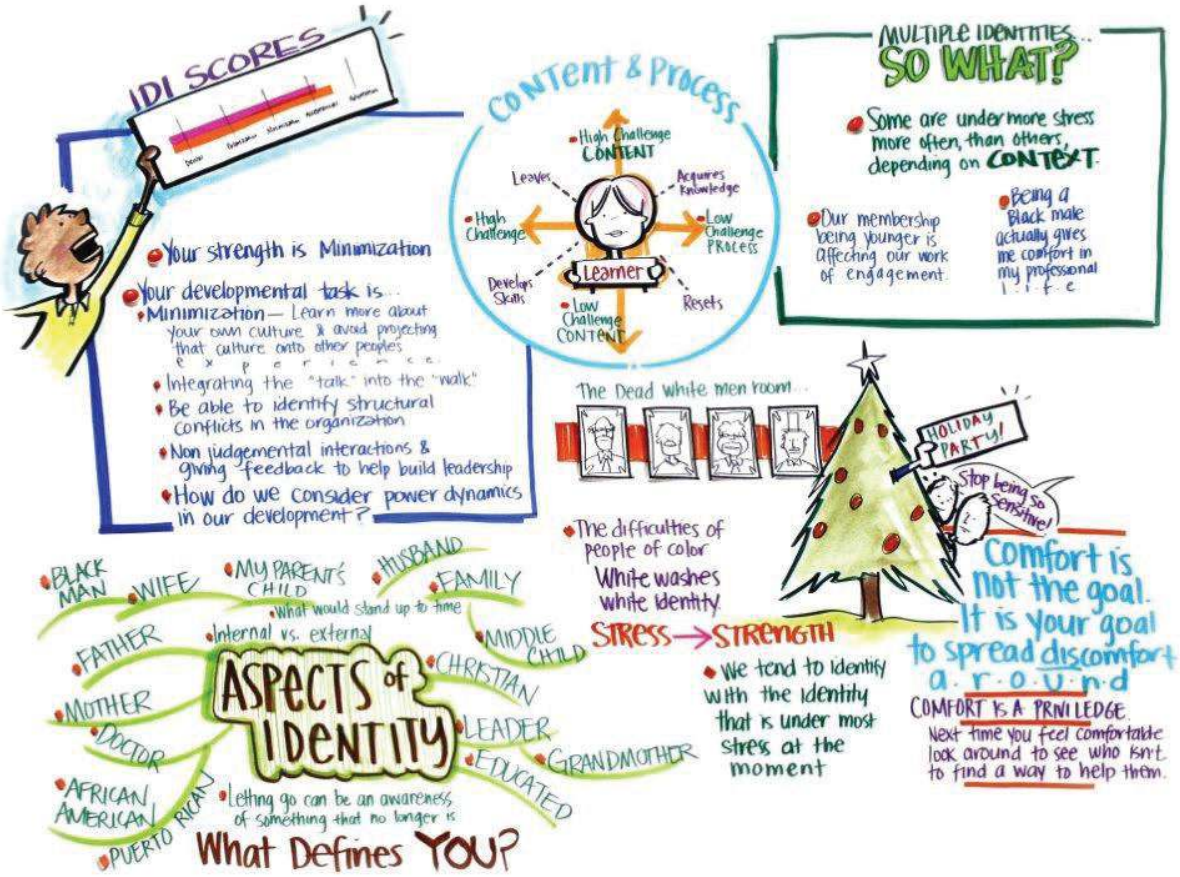
But, shortly after introducing the revised inclusion statement, KCF community investment and donor relations officers found themselves fielding questions about the intention behind the new wording. "People were asking: 'Why are you applying this idea of practicality? It opens the door to potential racial discrimination,'" Stotz-Ghosh says.

Far from being discouraged by the difficulties of finding just the right words to communicate its own vision of inclusion, KCF leadership views the latest challenge as an opportunity to learn more about what inclusion means to the community it serves.

"Really, it's an opportunity for us to gather community voices, to hear how people are interpreting the new language," Stotz-Ghosh says. "Ultimately, the policy is accomplishing what it was intended to do, which is to engage this community in a conversation about the meaning of inclusion."

Many PALN team members note that the IDI assessment and IDC developmental model curriculum have given them a vocabulary that helps them to understand themselves, their organizations, and everyone they interact with from a new intercultural perspective. This is more than just a "common language," where everyone uses the same words to mean the same things. It is also a learning language—one that continually opens doors to new insights and understanding. As WKKF's Tabron says, the developmental model has 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."

Today, an introduction to the IDC and individual IDI assessments are part of the WKKF's onboarding for all new hires. All new staff members take the IDI and create their own intercultural development plans in individual coaching sessions with Zemsky.



The boards of trustees at both WKKF and GRCF have also participated in IDC assessment and coaching, a move Zemsky recommends, "particularly if you are thinking about policy and practice changes. It's important for the board to be aligned with the staff, to share a language to talk about the intentions for how and why policies and practices are changing."

WKKF's Ali Webb, director of Michigan programs, says that there were many instances in which she was able to bring her PALN skills and experiences back to her 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?'"

Webb has also 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."

Marcia Rapp, GRCF vice president of programs, says that she has seen significant change in organizational culture as a result of the PALN work. "There's more openness to learning about differences rather than being either afraid of or ticked off by them," she explains. "In conversations around underserved populations I see people who in the past would have been silent or said negative things now asking questions and really throwing themselves into learning about difference."[22] In March of 2012, GRCF was awarded *Full Partner Designation* from Partners for a Racism-Free Community.

On the donor front, GRCF has stepped up its efforts to engage the Lesbian, Gay, Bisexual, and Transgender (LGBT) community in Grand Rapids.

"As a community foundation, we've been quietly supportive of the LGBT community for many years," says Marilyn Zack. But she credits the PALN program's emphasis on intercultural sensitivity with helping the foundation "become a lot more comfortable with being intentional about our work in this area." In 2013 GRCF offered a series of estate-planning workshops for LGBT couples and individuals to help them gain a greater understanding of the unique challenges they might face.

"We're opening up a new pipeline of potential donors who now respect the work of our community foundation because we show that respect back to them," Zack says. "And this is just one example of a group that has typically not been engaged when it comes to organized philanthropy."

6 Moving Forward

WKKF, GRCF, and KCF have all committed teams to join the fourth PALN cohort in 2013.

"As organizations' developmental orientations move, their goals for themselves also move," says Zemsky. "They want more. If your goal is to deeply understand the communities in which you operate to meet your mission in the way that's most effective for your communities—that kind of development takes time. This is not a 'one and done' kind of workshop."

GCF's Zack agrees that diversity and inclusion "isn't an issue that is addressed quickly, and it will take some time for us to tell our story out in the community. But the community foundation is perfectly situated as a change agent in Grand Rapids, and our really intentional work in the area serves as a good example for other organizations. Over time, I really do believe that the growth we've experienced through PALN will infiltrate throughout the community, and we'll all be better for it."

Sieger admits that she is still "stunned" by organizations in the community that don't have—or understand the importance of having—"a blend of voices on their boards." But she says her new awareness of the developmental nature of intercultural competence has helped her to realize that it's not "our responsibility to send off an edict to an organization that doesn't know at this point in time why that's important." She and her staff plan to work with their community partners "in phases and stages, providing assistance to help them reach that understanding."

Pickett-Erway says that, in addition to greater intercultural competence, KCF has acquired "a more realistic understanding of how hard it is to move the needle on these issues. It took a lot of work, a lot of focused energy, and we're still not as far along as we want to be."

To keep the needle moving, regularly scheduled "lunch and learn" meetings are hosted and facilitated by the KCF Inclusion and Diversity team. Participation is voluntary, but Pickett-Erway reports that despite the staff's busy workload, the sessions are invariably well attended. "It's a way for us to keep the content fresh and moving forward," she says. "It's a really important step for us to go out and practice communication, then share how it's going and how we can do it even better. The safe space that it takes for us to have that conversation has been very carefully and very intentionally built over the last year."

"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." Thinking about WKKF's mission to create "an environment in which vulnerable children are protected, nurtured, equipped, and stimulated to succeed," 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."

KEYS TO BUILDING INTERCULTURAL COMPETENCE: LESSONS FROM PALN

Lead from the Top
Foundation executives must champion and model this work from the beginning. PALN participants unanimously support CMF's decision to accept only teams led by foundation CEOs or other senior staff.

Define the Terms
A shared vocabulary of clearly defined concepts is essential. PALN seminars "anchored the participants in a shared language about diversity and inclusion and a shared set of experiences exploring those issues both personally and within their organizations."[23]

Engage Your Board
When trustees learn about intercultural development, ideally through taking the IDI assessment themselves, it helps align them with management's diversity and inclusion goals and strategies.

Ask Questions
Cultivate and support an attitude of curiosity and openness to learning. Develop ways to get regular input and feedback from community partners and the populations they serve.

Suspend Judgement
People have their own legitimate starting points, based on their own personal histories and experiences. Many PALN participants noted that the IDC developmental model helps people understand where they and their colleagues stand on the continuum and why, without passing judgement.

Experiment
Transforming individual and organizational norms takes practice. PALN participants valued action learning projects as opportunities to experiment with, and refine, new knowledge and skills.

Write It Down
To sustain new skills and understanding, hard-wire your organization with clearly documented policies and practices. Good intentions are not enough.

Measure Progress
The IDI is universally seen as an innovative and meaningful tool for measuring progress toward intercultural competency. Many people noted that the IDI is an international metric —one that can be used to communicate not only across U.S. cultures, but across nations.

Don't Stop
Change still comes achingly slow, especially in terms of interactions with boards or donors or agencies that haven't been through the PALN learning process. The journey takes time. Be persistent.

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Credits:

Vicki Rosenberg
Vicki Rosenberg & Associates
Editor

Debra Wierenga
D2 Words
Writer

Karen Gibson
Designer

Ronna Alexander
Alexander Ink
Graphic Recorder

John Lacko
Lacko Photography
Photography

Council of Michigan Foundations
One South Harbor, Suite 3
Grand Haven, Michigan 49417
616.842.7080
michiganfoundations.org