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Changing the Culture of Philanthropy in Michigan From Audacious Beginnings to Real Results

By Vicki Rosenberg

In 2008 and 2009, two documents rocked the world of institutional philanthropy in the United States: California's Assembly Bill 624 (AB624), calling for foundations with assets of more than \$250 million to collect and publicly disclose certain ethnic, gender and sexual orientation data pertaining to governance, operations and grant-

making, and NCRP's *Criteria for Philanthropy at Its Best*.

The California bill (eventually rejected by the state senate) would have required large foundations to confront inequities with regard to the demographic composition of their boards, staff, grantees and vendors. The NCRP *Criteria*, introduced as "a tool for meaningful self-regulation," cautioned: "If grantmakers don't improve their relevance to society by regulating themselves with integrity and rigor, government regulation will likely increase." The reaction was intense: some philanthropic leaders found the idea of any regulation – or benchmarks – audacious.

In a quieter, but in some respects equally audacious move, the Council of Michigan Foundations (CMF) began a six-year initiative in 2008 that president and CEO Rob Collier boldly named "Transforming Michigan Philanthropy Through Diversity and Inclusion" (TMP). Conceived as a catalyst for positive social change, TMP aimed to increase the effectiveness of organized philanthropy in the state focusing on CMF's 350 family, community, corporate, private and public foundations.

Five years later, CMF has clear evidence that the once audacious TMP objective to "increase member understanding and (continued on page 9)



challenging grantmakers
to strengthen communities

Diversity in Michigan's Philanthropy

(continued from page 1)

support for voluntary action to become more diverse and inclusive" has established roots in the state. A group of "early adopters" from within CMF's membership has been deeply engaged in transforming their foundations' internal cultures, policies and practices, and the way they engage with community stakeholders and partners. The results of their efforts are beginning to have a noticeable impact in the communities they serve.

SEEDING A MOVEMENT

TMP was officially launched in March 2009 at a Detroit symposium co-hosted by CMF and the Diversity in Philanthropy Project. Over two days, close to 90 individuals (including CEO-led teams and trustees of Michigan foundations, as well as experts and partners from across the country) debated and imagined what could be achieved through TMP. The discussion was framed by the findings of three studies commissioned by CMF to document current demographics, policies and practices of foundations in the state.

Among other recommendations, symposium 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 on organizational strategy and culture) to design and serve as lead faculty for the Peer Action Learning Network (PALN) on diversity and inclusion.

Designed to build knowledge and skills in intercultural competent leadership, management and grantmaking,

PALN has engaged CEO-led teams from eight foundations – many of them participants in the 2009 symposium – in a year-long immersion curriculum based on the Intercultural Development Continuum (IDC) (M. Hammer, 2011).

The program begins with baseline Intercultural Development Inventory (IDI) assessments to measure the "intercultural competence" levels of individual team members and their organizations. 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.

Over the course of the year, teams participate in six one-day seminars designed to help them move to the next stage of intercultural sensitivity as outlined by the IDC model (see p. 10).

Seminars include presentations, group exercises and other activities to help participants develop understanding and skills in organizational culture change, team building, managing power dynamics and intercultural competent conflict resolution. Between meetings, teams complete action-learning projects based on actual work responsibilities and receive monthly coaching support to achieve their learning goals.

In 2013, CMF retested all PALN participants and their foundations' employees using the IDI. Preliminary findings show a statistically significant change in levels of individual and organizational intercultural competence. On average, participants moved the equivalent of one level – from the minimization stage to the acceptance stage, or from acceptance to adaptation – after completing the PALN program.

RIPPLE EFFECTS

It's exciting to see the impact of PALN graduates on their foundations' organizational cultures, their engagement with grantees and community partners,

and their strategies for increasing equity in the state. The ripple effects extend beyond anything the bold project team at CMF imagined in 2008. Here are just a few examples.

Grand Rapids Community Foundation

In 2006, the board of trustees of the Grand Rapids Community Foundation (GRCF) declined to approve a proposed anti-discrimination policy for grantees and asked staff to re-present the policy when the foundation *itself* met the demographic, policy and practice requirements it sought to require of grantees. In 2010, GRCF president Diana Sieger – a champion for TMP from its conception during her tenure as chair of CMF's board of trustees – made sure that hers was the first foundation registered for the inaugural PALN program.

Since then, GRCF has sent two teams to PALN, and those teams have initiated and managed significant changes in organizational culture, communications and work with community partners.

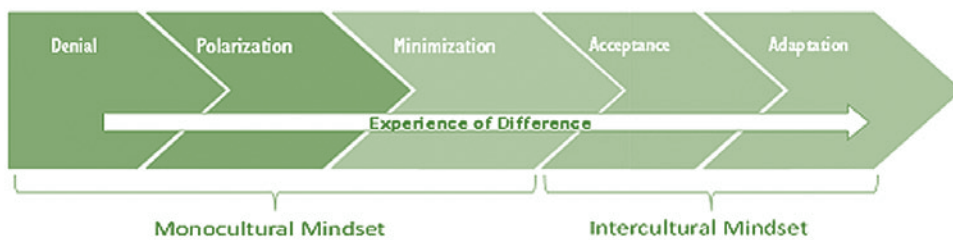
For example, GRCF is currently hosting its first estate planning workshop for civically engaged LGBT individuals or couples, a clear indicator of a more inclusive approach to donor development. The foundation is also participating in a CMF project designed to increase its grantmaking capacity "at the crossroads of issue, population and place" and to effectively support LGBT individuals and other marginalized communities within existing grantmaking guidelines and programmatic frameworks.

Just recently, GRCF was honored as one of the first recipients of a community certificate recognizing anti-racist organizations. And, in April 2013, the foundation's board of trustees officially approved that anti-discrimination policy for grantees.

Kalamazoo Community Foundation

Another PALN three-year veteran, the

INTERCULTURAL DEVELOPMENT CONTINUUM



(KCF) is also making progress toward engaging a more diverse group of donors. The focus of its PALN action project has been building a base of donors from among women of color in the Kalamazoo area.

President and CEO Carrie Pickett-Erway notes that PALN has helped KCF become a learning organization that encourages and supports a continuous cycle of learning, action, reflection and improvement, eliciting staff input to improve communication and interaction with community stakeholders.

For example, with a more nuanced understanding of intercultural differences, KFC staff initiated changes to the foundation's annual landscape scan, asking stakeholders to share ideas on emerging community trends and to make suggestions regarding the foundation's work and the organizations it should partner with.

Most recently, KCF revised a longstanding anti-discrimination policy required of grantees when staff realized that it did not address the unique differences of religious institutions but rather focused solely on those of minority-led nonprofits. A series of internal discussions led to adjustments that more effectively honored those differences, resulting in a significant increase in satisfaction among all staff and greater opportunities to support valued religious institutions serving the community.

W.K. Kellogg Foundation

During the three years that teams from the W.K. Kellogg Foundation

led by president and CEO, Sterling Speirn, the organization has made significant changes to its human resource policies and practices. Today, racial equity programming strategies are essential to organizational goals. As part of the yearly performance review cycle, racial equity and valuing people are two of the critical success factors against which all employees are assessed. In addition, all employees are expected to have at least one performance or learning goal related to racial equity.

Human resources analyst Deborah Green says that WKKF, like many organizations, "initially focused its internal diversity efforts on counting people." But the foundation has come to understand that real diversity and inclusion are about "so much more than the demographics. They're about the experience that staff members have while they are here and how all of our actions influence the work environment, from learning about and celebrating our differences to addressing structural barriers that perpetuate inequities."

As the result of a PALN action project, WKKF has revamped its core customer service training for all staff members, from a corporate model that did not address cultural considerations as part of customer needs to one that integrates intercultural competency into the curriculum. The foundation also includes an introduction to the IDC and individual IDI assessments as part of its on-boarding for all new hires.

MOVEMENT BUILDING

The success of the TMP initiative is being measured through the lens of social movement building. Key indicators of success are:

- Mobilizing a base of individuals around issues they are passionate about.
- Sharing a long-term vision for change.
- Going beyond a single issue to a set of connected issues.
- Challenging current conditions and assumptions.
- Building the organizational and leadership infrastructure to support sustainable, long-term change.

CMF and the growing group of foundation champions engaged in TMP through PALN and other activities are moving the needle on each of the movement building indicators. To date, CMF has engaged staff and trustees from more than 100 foundations in this work, expanding it in 2011 to include a major initiative on equity.

One of the most exciting indicators that TMP is having the catalytic role envisioned by the CMF board is the interest PALN alumni have created through sharing their stories with leaders in higher education, government and the nonprofit sector. As Michigan's movement for equity continues, the likelihood of achieving that once audacious vision seems within reach. ■

As a vice president for the Council of Michigan Foundations, Vicki Rosenberg designed and managed the audacious Transforming Michigan Philanthropy Through Diversity and Inclusion initiative and related equity initiative. She is now president of Vicki Rosenberg & Associates and advises CMF on TMP and directs PALN and related equity programs. Her work with clients continues to promote transformative change in the philanthropic sector.