



SYMPOSIUM

**on Diversity & Inclusion
in Philanthropy**

THE MICHIGAN EXPERIENCE

MARCH 2-4, 2009 | DETROIT, MI

Diversity
Philanthropy

PROGRAM AGENDA

EVENT GOALS, OBJECTIVES & GROUND RULES

Goals:

- To explore how increasing diversity and inclusive practice within Michigan's philanthropic sector can increase effectiveness and improve social impact
- To identify opportunities for inspiring and supporting action across the sector in Michigan and the nation

Objectives:

- Discover the existing strengths in Michigan's philanthropic sector for increasing diversity and inclusive practice
- Build a shared vision for a diverse and inclusive philanthropic sector
- Commit to individual and/or collective action

Ground Rules:

- Participate fully, by being present at all times – please put Blackberries and phones away until breaks
- Be a good listener – listen fully and openly without interruption or judgment
- Honor safe space by keeping confidential what is shared with you in small groups
- Celebrate the wisdom, experience, commitment, power and potential in this group
- Have fun!

CMF's DEFINITION OF DIVERSITY

"...men and women from different national origins, ethnicities, races, cultures, generations, religions, economic backgrounds, gender identities and sexual orientations, and with different skills, abilities, lifestyles and beliefs..."

FUNDERS & SUPPORTERS

Our thanks the following foundations for their support of the *Transforming Michigan Philanthropy Through Diversity and Inclusion (TMP)* initiative and this Knowledge Symposium:

Arcus Foundation

THE KRESGE FOUNDATION



SYMPOSIUM ADVISORY GROUP MEMBERS

Many thanks to the Symposium Advisory Group members, without whom this event would not be possible!

- Tonya Allen, vice president of program, The Skillman Foundation
- Jacquelynn Borden-Conyers, communications manager, W.K. Kellogg Foundation
- Andrew Gatewood, program officer, The Kresge Foundation
- Guillermina M. Hernandez-Gallagos, senior program officer, Fetzer Institute
- Johnny Jenkins, Jr., Michigan program officer, The Arcus Foundation
- Sylvester Jones, program officer, Ruth Mott Foundation
- Marcia Rapp, vice president of programs, Grand Rapids Community Foundation
- Kimberly Roberson, program officer, C.S. Mott Foundation

PHOTOGRAPHY & VIDEOGRAPHY

A photographer and videographer team will be shooting throughout the symposium. Please contact Becky Noricks, CMF communications manager, at 616.842.7080 by March 13, 2009 if you prefer not to have your image used in CMF or DPP informational or promotional products.

DAY 1 – MONDAY, MARCH 2, 2009

Objectives:

- Establish expectations & context
- Begin building a community of practice

TIME	AGENDA ITEM/DESCRIPTION	ROOM
1:30 p.m.	Registration Opens	<i>Outside Woodward B</i>
3:00 p.m.	Symposium Opening: Goals, Objectives, Agenda, Participants & Expectations/Ground Rules	<i>Woodward B</i>
3:15 p.m.	Building Our Community – Self Introductions	<i>Woodward B</i>
4:00 p.m.	Welcome Statements <ol style="list-style-type: none"> 1. Our Partnership for Diversity & Inclusion <i>Rob Collier, president & CEO, Council of Michigan Foundations</i> <i>Henry A. J. Ramos, director, Diversity in Philanthropy Project (DPP)</i> 2. Michigan & Beyond: Promoting Voluntary Action for Diversity & Inclusion <i>Sterling Speirn, president & CEO, W.K. Kellogg Foundation, and co-vice chair, DPP</i> <i>Carol Goss, president & CEO, The Skillman Foundation, and chair, TMP Advisory Committee</i> 	<i>Woodward B</i>
4:30 p.m.	Our Own Stories – Individual & Small Group Work	<i>Woodward B</i>
5:00 p.m.	Reflections on Individual & Collective Aspirations	<i>Woodward B</i>
5:30 p.m.	Break	
6:00 p.m.	Reception	<i>Italian Garden</i>
6:30 p.m.	Dinner & Presentation: Michigan as a Context for our Work <i>Linda Parker, judge, Third Judicial Court of Michigan, and former director, Michigan Department of Civil Rights</i> <i>Rob Collier, president & CEO, Council of Michigan Foundations</i> <i>Breannah Alexander, member, Michigan Community Foundation Youth Project Committee, and member, Michigan Community Service Commission</i> Moderator: <i>Karen Aldridge-Eason, foundation liaison, Office of the Foundation Liaison to the Governor</i>	<i>Crystal Ballroom</i>
	Facilitated Table Discussions: The Promise of Statewide Philanthropic Action	<i>Crystal Ballroom</i>
8:30 p.m.	Adjourn for the Day	

DAY 2 – TUESDAY, MARCH 3, 2009

Objectives:

- Develop a shared vision of enhanced inclusivity and effectiveness for Michigan and its philanthropic sector, building on collective assets
- Explore new frameworks, rationales and promising practices for building and maintaining diverse and inclusive foundations

TIME	AGENDA ITEM/DESCRIPTION	ROOM
7:00 to 8:30 a.m.	Registration Open	Outside Woodward B
7:00 a.m.	Breakfast – Optional Roundtables	Crystal Ballroom
8:00 a.m.	Welcome Back, Today's Agenda & Reflections	Woodward B
8:30 a.m.	Mapping Our Collective Strengths An exploration of the group's collective strengths, experiences, resources and tools	Woodward B
9:30 a.m.	Understanding our Starting Point for Diversity in the Philanthropic Sector <ol style="list-style-type: none"> 1. Findings: Michigan Foundation Staff, Trustee and Youth Grantmaker Demographics <i>Evaluation Team: David Bleckley, research coordinator, and Mary McDonald, former director, Community Research Institute at The Johnson Center for Philanthropy, GVSU</i> 2. The National Picture <i>Larry McGill, senior vice president for research, Foundation Center</i> 	Woodward B
10:15 a.m.	Break	
10:45 a.m.	Toward a Common Vision: Diversity & Inclusive Practice for Greater Community Impact A world café dialogue to explore a common vision for Michigan's philanthropic sector	Woodward B
12:00 p.m.	Lunch	Crystal Ballroom
1:00 p.m.	Inside Foundations: Leadership, Culture & Practice <ol style="list-style-type: none"> 1. Leading Organizational Change: The Promise and Challenge of Diversity & Inclusion in Foundations <i>Dr. Lynn Wooten, clinical associate professor, Ross School of Business, University of Michigan</i> <i>Dr. Mary Ellen Capek, consultant, Diversity in Philanthropy Project</i> 2. Reflection & Dialogue: Explore the tipping points and motivators that build the will to focus on diversity, the opportunities to catalyze change, and the organizational roadblocks to overcome. 	Woodward B
2:30 p.m.	What's Happening in Michigan Foundations? <ol style="list-style-type: none"> 1. A Policy Review <i>Evaluation Team: David Bleckley, research coordinator, and Mary McDonald, former director, Community Research Institute at The Johnson Center for Philanthropy, GVSU</i> 2. Themes and Stories from the Field <i>Jessica Bearman, consultant, Diversity in Philanthropy Project</i> 	Woodward B
3:30 p.m.	Break	
3:45 p.m.	Breakout Discussions on Strategies & Practices Participants will participate in two 40-minute breakout sessions, led by national resource people, focusing on a deeper investigation of specific aspects of diversity and inclusive practice in foundations:	
	<ul style="list-style-type: none"> • Staff Diversity & Cultural Competency <i>Mary Ellen Capek, consultant, Diversity in Philanthropy Project</i> <i>Larry Smith, director, Millennium Initiative, The Center on Philanthropy at Indiana University</i> 	Woodward B
	<ul style="list-style-type: none"> • Organizational Policy & Practice (HR, communications, etc.) <i>Vicki Rosenberg, vice president, education, communications, external relations, CMF</i> <i>Lynn Wooten, clinical associate professor, Ross School of Business, University of Michigan</i> 	Woodward D
	<ul style="list-style-type: none"> • Board & Executive Leadership – Leading for Organizational Change <i>Jan Jaffe, project leader GrantCraft, Ford Foundation</i> <i>Vernetta Walker, director of consulting, BoardSource</i> 	Woodward C
	<ul style="list-style-type: none"> • Stakeholder Engagement & Grantmaking <i>Robert Espinoza, director of research, Funders for Lesbian & Gay Issues</i> <i>Lori Villarosa, executive Director, Philanthropic Initiative for Racial Equity</i> 	Founders A

~ Continued...More Breakout Options on Next Page ~

3:45 p.m.	Breakout Discussions on Strategies & Practices – continued	
	<ul style="list-style-type: none"> Connecting Effectiveness & Diversity <i>Jessica Chao, vice president, Rockefeller Philanthropy Advisors</i> <i>Anna Pond, consultant, Diversity in Philanthropy Project</i> 	<i>Founders B</i>
	<ul style="list-style-type: none"> Diversity & Inclusion – Working with Living Donors/Funders <i>Renee Branch, director diversity & inclusive practices, Council on Foundations</i> <i>Oran Hesterman, former president, Fair Food Foundation</i> 	<i>Woodward B</i>
	<ul style="list-style-type: none"> Using Data to Inform Decisions <i>David Bleckley, research coordinator, Community Research Institute</i> <i>Larry McGill, senior vice president for research, Foundation Center</i> 	<i>Woodward B</i>
5:15 p.m.	Synthesis & Reflection for the Day	<i>Woodward B</i>
6:00 p.m.	Break	
6:30 p.m.	Dinner & Discussion	<i>Crystal Ballroom</i>
8:00 p.m.	Adjourn for the Day	

DAY 3 – WEDNESDAY, MARCH 4, 2009

Objectives:

- Explore opportunities/challenges of organizational change from individual roles
- Identify opportunities in role-alike (trustees, CEOs, Program staff, etc.) groups
- Develop preliminary commitments to action (individual, foundation, group and CMF)

TIME	AGENDA ITEM/DESCRIPTION	ROOM
7:00 to 8:30 a.m.	Registration Open	<i>Outside Woodward B</i>
7:00 a.m.	Breakfast – Optional Roundtables	<i>Crystal Ballroom</i>
8:00 a.m.	Welcome Back: Thoughts & Reflections from Previous Day	<i>Woodward B</i>
8:45 a.m.	Role-Alike Group Dialogue Functional groups to examine specific opportunities, strategies and needs:	
	<ul style="list-style-type: none"> CEOs 	<i>Woodward C</i>
	<ul style="list-style-type: none"> Trustees 	<i>Woodward D</i>
	<ul style="list-style-type: none"> Senior Program Staff (VPs, Directors, Senior Program Officers) 	<i>Founders A</i>
	<ul style="list-style-type: none"> Program Staff (Program Officers, Program Associates, YAC) 	<i>Founders B</i>
	<ul style="list-style-type: none"> Administrative Staff (Human Resources, Finance, etc.) Regional Associations 	<i>Woodward B</i>
9:45 a.m.	Role-Alike Report Out	<i>Woodward B</i>
10:15 a.m.	Break	
10:30 a.m.	What Now? Foundation Teams Commit to Next Steps/Report Out Foundation teams reflect on the last day and a half and articulate commitments and needs going forward.	<i>Woodward B</i>
11:15 a.m.	Discussion: What do we want to make happen collectively? What is CMF's role in making that happen?	<i>Woodward B</i>
12:00 p.m.	Final Reflections & Closing Comments	<i>Woodward B</i>
12:30 p.m.	Adjourn (Optional Lunch)	