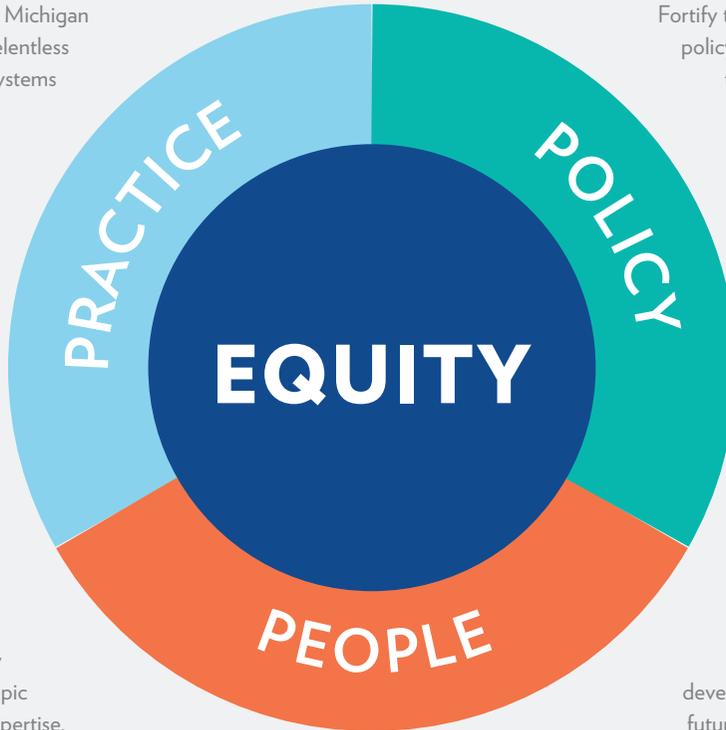


### CORE PRIORITIES

Embolden and equip Michigan philanthropy in the relentless pursuit of equitable systems and the embrace of inclusive diversity.

Fortify the field through public policy action, and champion the policy leadership of CMF members.



Advance and amplify exemplary philanthropic practices and field expertise.

Foster the growth and development of current and future philanthropy leaders.

### Our Vision

A thriving philanthropic sector leading in the relentless pursuit of equitable systems and inclusive diversity.

### Our Mission

We lead, strengthen and support Michigan's community of philanthropy.

### How We Lead

CMF is a leadership organization driven by our values and the power of people, equipped with deep sector expertise and the ability to anticipate and adapt, ever committed to continuous improvement.

### Our Values

Equity • Diversity • Inclusion • Integrity •  
Engagement • Collaboration

## **EQUITY AT THE CENTER The CMF Strategic Framework**

Presented to the CMF Board of Trustees • October 19, 2020

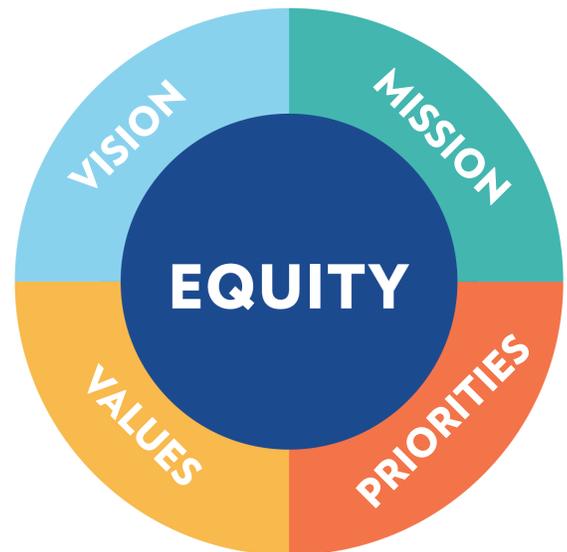
### **Our Framework**

The new CMF strategic framework is a significant milestone in our organization’s journey as we boldly pivot CMF to firmly place equity at the center of our work. It is through the courageous and collaborative efforts of our CMF Board of Trustees, deeply informed by insights from our stakeholders, that we are realigning to a profound new direction, building on nearly 50 years of excellence to position CMF for the next five decades of leadership.

The framework serves as our compass, providing clarity in our purpose and direction – to lead, strengthen and support our Michigan community in philanthropy as we strive to become a thriving philanthropic sector relentlessly pursuing equitable systems and inclusive diversity. Its charge calls on us to intentionally and urgently center around equity generally, and racial equity imperatively, through our core priorities of people, policy and practice.

Our next steps are to live into this new framework by methodically and deliberately exploring the ways we need to change. Our change management will require that we adopt new habits of untiring curiosity, a persistent focus on mission and the comfort and agility that comes with learning from both successes and failures. That is why we developed a clear “How We Lead” statement that points to adaptation and continuous improvement. We must remain open to what we can learn and how we can grow while remaining values-driven and people-centered through this transformation. Most important in all this change, we must communicate our direction and our learning, and lift up those same efforts among our community of philanthropy.

This truly is a pivotal moment for CMF and our community of philanthropy. This strategic framework and the direction toward equity that it demands may well be looked back on by future Michigan leaders as one of the most important points in our organization’s history at a time when it was needed most.



## Our Vision

***A thriving philanthropic sector leading in the relentless pursuit of equitable systems and inclusive diversity.***

Our new Vision makes clear where we hope to be impactful with our sphere of influence – a sector that includes philanthropy beyond our membership – and what we stand for – centering our work around equity. This is a commitment to action in dismantling systemic oppression to ensure all people have the opportunity to experience success and well-being. We are further committing to advancing the embrace of diversity in all the ways people differ, including ideas and perspectives, race, nationality, age, religion, disability, gender, sexual orientation, socioeconomic status, education, region, language and beyond. Beyond that, we are recognizing the critical importance of *inclusive* diversity – creating environments where all individuals and groups are welcomed, respected, supported and valued, with awareness of our own implicit bias.

## Our Mission

***We lead, strengthen and support Michigan’s community of philanthropy.***

Our mission states why we exist – our purpose – to clearly define who we serve and how we serve them. We intentionally begin with “lead” as the center point of our approach and immediately follow with “strengthen” to speak to the work we do in connecting and convening, and in public policy efforts that fortify our commitment to equity. “Support” captures critical roles we play in providing resources that range from learning services to data insights, and sometimes lead from behind to amplify the work of Michigan philanthropy. Essential to this mission is reference to Michigan philanthropy as a *community* to emphasize the relationship and deep network of the CMF membership and to recognize that CMF also takes on the work of ensuring the integrity and vibrancy of our field beyond our membership.

## Our Values

***Equity • Diversity • Inclusion • Integrity • Engagement • Collaboration***

Our values are overarching inviolate guiding principles, framed around the type of organization we want and need to be. Equity will always be first among them as we put equity at the center of our work, while embracing diversity and working to ensure our organization and our field is inclusive to all as CMF leads with integrity, powered by the meaningful engagement and collaboration of our stakeholders.

Our exploration to live into this framework will include an ongoing learning journey around what it will mean to

live our values. The Board of Trustees has helped us begin to shape a common understanding of our values, initially framed as follows:

### Equity

We intentionally elevate EQUITY to the center of all of our work to guide our priority setting and decision making. We marshal our resources to advance equitable opportunities and outcomes at a systems level that positively affects the lives of individuals. We acknowledge where people and organizations are in their own equity journey. We are persistent and courageous in this work, challenging ourselves to ask the tough questions and willing to engage in difficult conversations, always with compassion and empathy, and mindful of who has been invited to the table, and who has set the table for those conversations. We are transparent about our own journey, sharing both our successes and our struggles.

### Diversity

We intentionally seek different perspectives and value an organizational culture where everyone can be their full, authentic selves. We embrace all the facets and characteristics that make each person unique, including but not limited to their race, nationality, age, religion, disability, gender, sexual orientation, socioeconomic status, education, region, language and documentation status. We know that difference helps to drive smarter decisions, increased innovation and stronger performance.

### Inclusion

We intentionally create environments in which all individuals and groups are welcomed, respected, supported, valued and encouraged to participate fully. We ensure that all voices and perspectives are heard and understood. We share power and leadership. We are mindful of both who is at the table and who is not at the table, thoughtful of how, when and where the table is set.

### Integrity

We follow through on commitments and demonstrate our words in action. We communicate openly and operate with transparency. We are committed to continuously building trust. When faced with difficult decisions and hard choices, we center in our values. We understand that living with integrity requires doing what's right even when it's difficult or unpopular. We thoughtfully use data to inform our decision making.

### Collaboration

We know that our impact is stronger together than alone. We seek opportunities to partner in creating innovative solutions. We maintain an open mind and value the opportunity to learn from and with others. We communicate clearly and openly. We look for mutual benefit

Engagement

We create meaningful opportunities for the involvement of members and partners, fostering inclusive environments for stakeholders to share their best thinking and bring their authentic selves. We proactively seek out the participation of others while respectfully meeting them where they are, with multiple pathways to partnership, mindful of barriers and inequities that exist. We are aware of how we represent CMF and our community of philanthropy in the ways we participate.

**How We Lead**

***CMF is a leadership organization driven by our values and the power of people, equipped with deep sector expertise and the ability to anticipate and adapt, ever committed to continuous improvement.***

This critical component of our framework captures characteristics essential to operating as a highly effective 21st century leadership organization. Separate from values, “How We Lead” frames the way we do our work.

**Core Priorities**

Equity is a pillar of our work, and equity is embedded across the pillars of policy, practice and people.



*Equity: Embolden and equip Michigan philanthropy in the relentless pursuit of equitable systems and the embrace of inclusive diversity.*

CMF's best lanes to work toward our Vision and Mission and center equity include advancing public policy work and leaning into our strengths in connecting, convening and resource sharing. These methods to *equip* members will be vitally important to achieve equitable outcomes in Michigan. But perhaps the most important work we can do will be to embolden our community of philanthropy – to inspire, invigorate, boost, cheer, rally – so that every one of our members is further empowered in their journey. At the same time, we have far more work to do internally as an organization in our own equity journey (i.e. strengthening cultural competency, recognizing implicit bias). We're committed to transparency in sharing our progress and our lessons learned along the path to come.

*Policy: Fortify the field through public policy action, and champion the policy leadership of CMF members.*

We heard loud and clear over many months of listening that our work in public policy is essential to supporting members and to strengthening our sector, not only in Michigan but across the country. CMF is a recognized national leader in its public policy and advocacy efforts, and we're enthusiastic about opportunities to deepen this work as we work to truly move the needle in systems change to advance equity. We're also enthusiastic about opportunities to develop new (and enhance existing) pathways for engagement, communication and education that empower members to be increasingly active in their public policy work and well supported by the CMF team.

*People: Foster the growth and development of current and future philanthropy leaders.*

CMF is already poised to provide deep leadership that can grow the sector. We see opportunity to enhance those efforts and apply a more intentionally and continuously-focused inclusive lens to that work. For example, while we already have an exceptional network of YACs across Michigan, are we doing enough to lift up the need for youth to be at the table as effective problem solvers and decision makers? How can the work of Learning to Give be better positioned to connect to all members? We have deep resources to assist new professionals in the field, but are we doing enough to include second-career emerging practitioners? It should be noted that the language of this pillar's reference to focusing on "leaders" is intended to be inclusive of staff across all levels of an organization and across all roles, all of whom can be and are philanthropy leaders, to be inclusive of trustees who are leaders, and to recognize that our youth, too, can be and are philanthropy leaders.

*Practice: Advance and amplify exemplary philanthropic practices and field expertise.*

Across constituent types, regions, roles and focus areas, CMF members have shared that they deeply value opportunities to learn how to do their work better, with greater impact. Related to the changes we see in the field – foundation staff composition, donor giving habits, etc. – it will be imperative that we are the first stop for Michigan grantmakers looking to deepen their knowledge in philanthropy practices. Whether we’re lifting up tools like impact investing or approaches to managing donor advised funds, this is a space where we need to be adept at responding to change and anticipating what’s on the horizon. This is an area where we see great potential to (1) amplify equitable philanthropic practices centered in trust and relationship building and (2) enhance collaboration with sector partners who can provide expertise and capacity building in this space.