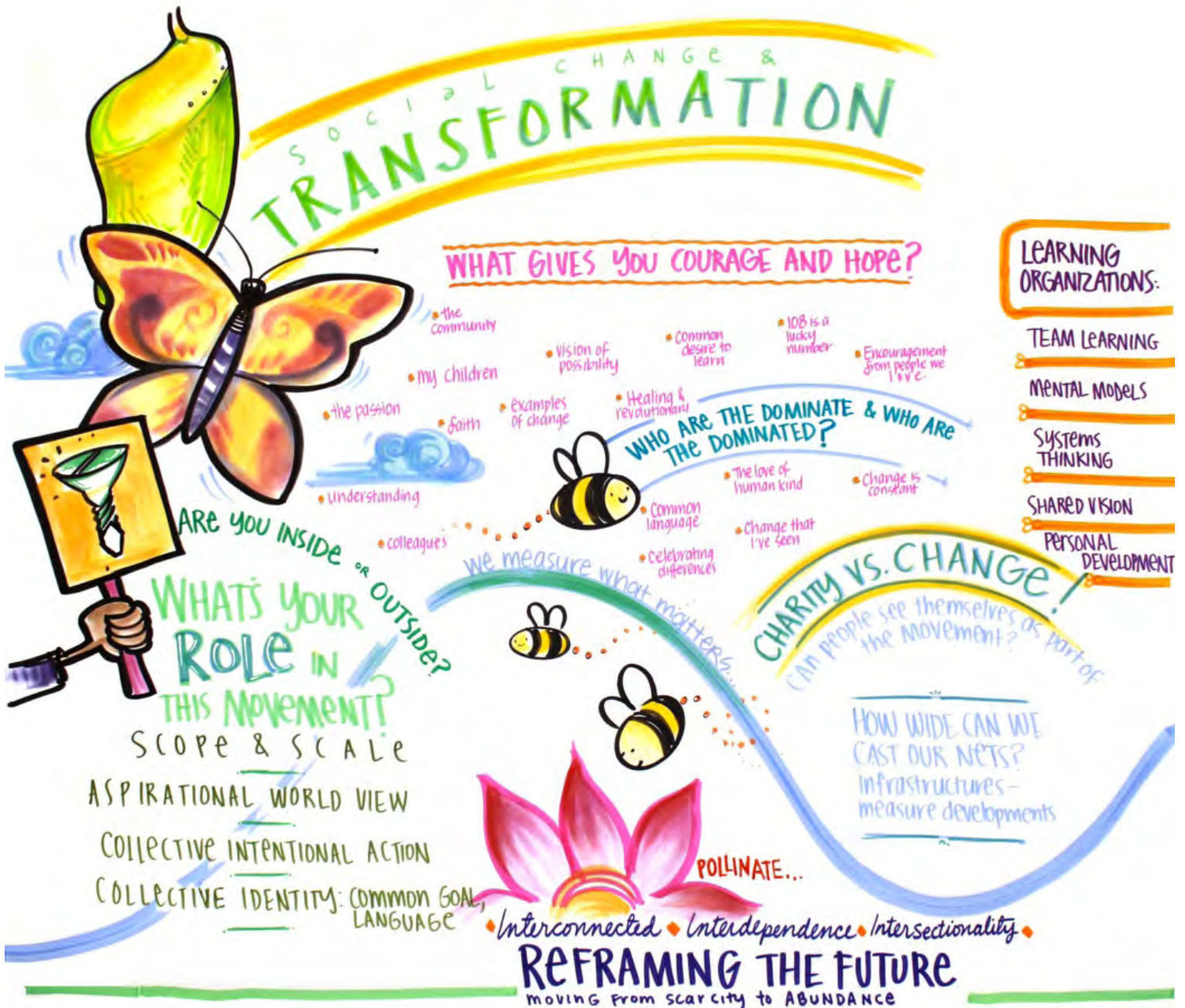


LEARNING TOGETHER:

The Peer Action Learning Network for Diversity and Inclusion

STORIES OF CHANGE



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.



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 findings¹ 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

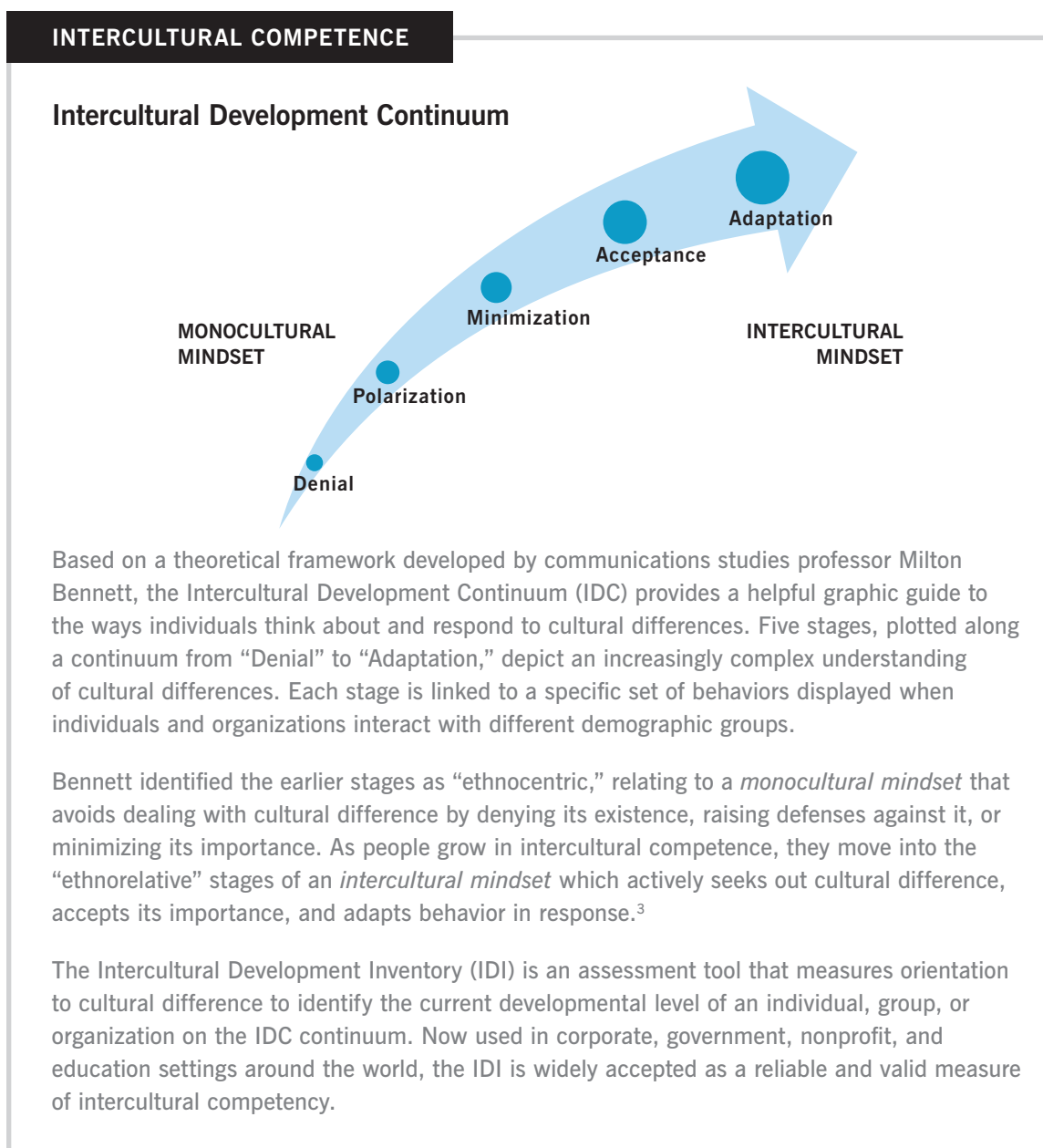
Researchers have found that these groups can significantly amplify conventional learning practices when:

- 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)[®].



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 group¹¹ 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

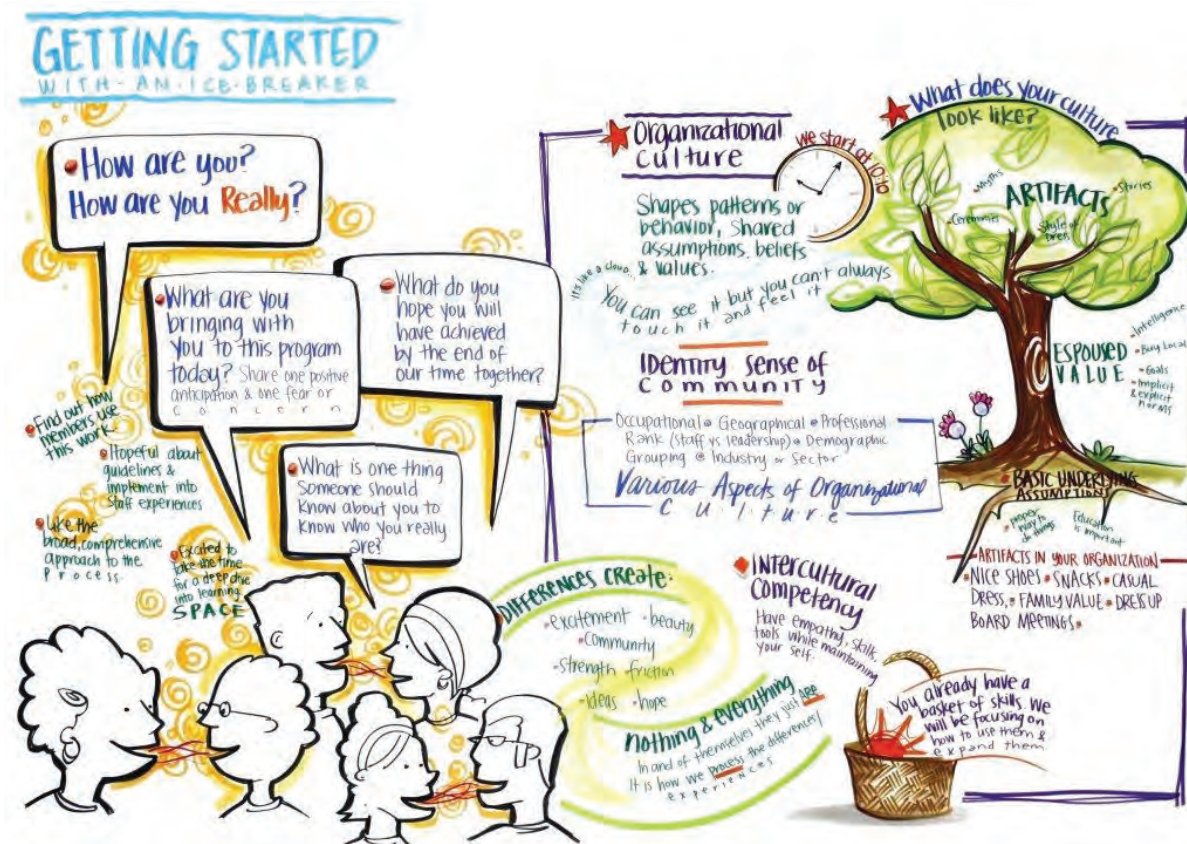
3 Insight

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

A Deeper Dive: Moving Beyond Diversity 101 at Grand Rapids Community Foundation

A community foundation gets intentional about diversity and inclusion.

Established in 1922 “with little more than a \$25 donation and a dream,” the Grand Rapids Community Foundation has grown from a fledgling grantmaking organization focused on “perpetuating the moral, physical, and mental welfare of the city and its people” to a seasoned and engaged community leader. In 2000, the foundation changed its name to Grand Rapids Community Foundation (GRCF) to reflect its expanded roles of convening, advocacy, and initiatives advancing “long-term solutions to diverse community challenges.”¹

Under the 25-year tenure of the current president, Diana Sieger, the foundation 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. Sieger notes that, although the community foundation has “taken heat”² over the years for its focus on diversity and inclusion, management and staff have remained committed to raising awareness of and learning about discrimination in all its forms, participating in training programs such as the Institute for Healing Racism³.

Challenge

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.”⁴

That same year, Sieger, a charter member of the advisory committee for CMF’s Transforming Michigan Philanthropy through Diversity and Inclusion (TMP) initiative, learned about the Peer Action Learning Network (PALN).

Intrigued by the program’s proposed curriculum and its emphasis on intercultural competency as a means of transforming philanthropic organizations and their funding behaviors, Sieger says that “when we heard about the opportunity of the Peer Action Learning Network, we just jumped at the chance.”

The timing proved fortuitous. Marcia Rapp, GRCF’s vice president of programs, recalls thinking that getting through the PRFC assessment would take “a month or two. We felt we were already hitting the mark on these issues,” she says. “But it turned out to be an extremely rigorous process.”⁵ In 2010, she and Sieger formed the first



Marcia Rapp

GRCF PALN team. The team made PRFC accreditation the focus of its year-long “action learning project.”

Insight

Sieger, Rapp, and four other GRCF leaders formed a team that joined groups from five other Michigan foundations to make up the first PALN cohort, in 2010. “We had no idea what the experience was going to be,” Sieger says. “That first year was like peeling away an onion skin—layer after layer of *aha!* moments.”

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.

The revelations began when the team received the results of their individual, team, and organization Intercultural Development Inventory (IDI)[®] assessments (see sidebar). “Taking a look at the aggregate scores for our group and for the entire organization—getting a picture of the worldview of the Grand Rapids Community Foundation—was quite eye-opening for us,” says Sieger.

GETTING A PICTURE OF THE WORLDVIEW OF THE GRAND RAPIDS COMMUNITY FOUNDATION WAS QUITE EYE-OPENING FOR US.

—Diana Sieger, president

Like many well-intentioned organizations that have been through diversity training and worked to increase awareness of racial discrimination, GRFC found itself in the middle of the Intercultural Development Continuum (IDC)[®], in the “Minimization” stage where organizational behaviors tend to downplay cultural differences and emphasize the ways in which “people are people.”

“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,” Sieger says, “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 in their world, and come at it that way.”

Other members of the first GRFC PALN team 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, vice president, 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.”⁶

As the team members worked their way through the PALN curriculum, they came to new levels of understanding about diversity and inclusion. “We had two excellent facilitators in Beth Zemsky and Lynn Wooten,” Sieger says, “and they designed a process that was not another ‘Diversity 101,’ but one that presented a broader view of cultural competence. That was so helpful.”

“I have been exposed to a lot of work with diversity and inclusion, but more on the racism side of things,” says Jonse Young, director of philanthropic services and another member of the first GRFC PALN team. “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.”⁷

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.

—Jonse Young, director, philanthropic services

Young recalls a particularly enlightening PALN session where the subject was “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,” she says. “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,

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.⁸

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.

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.”

Strategy

Working on their PRFC accreditation was a natural choice for the first GRFC PALN team’s Action Learning Project, in which participants use their new intercultural insights and skills to tackle an organizational objective.

Designating the accreditation work as a group project “helped us get through this very rigorous process,” Young says. “It 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.”

As GRFC “co-champions for diversity and inclusion,” Rapp and Young had been spearheading the work with Partners for a Racism-Free Community. When the PALN team strategized their Action Learning Project, they decided that the policy review work was something that “needed to be done on a continuous basis, to be engrained in our organization,” Young explains. “PALN helped us mobilize the work and spread it out among the other team members. Then other staff got involved—it was contagious.”

Young says that the GRFC team was “very intentional” about sharing its PALN experience with colleagues back at the foundation. “We demonstrated or reenacted the PALN exercises in our ‘town hall’ staff meetings.” Referring to her well-used copy of the PALN *Toolkit*—a collection of handouts and exercises designed to help PALN participants share knowledge and skills with the rest of their organization—Young says: “It’s tattered and torn because I have been using and plan to keep on using it. It’s a good resource.”



GRFC PALN team

Zack affirms that one of the most helpful aspects of the PALN curriculum was that “it provided us a platform for coming back to the foundation and just talking about these issues in a really open and honest way. All of a sudden those conversations got pretty simple because PALN provided the information, the context, the tools we needed to have those conversations back here at the office,” she says.

Results

In March of 2012, “after a great deal of work and dedication on the part of all staff at the Community Foundation,”⁹ GRFC was awarded *Full Partner Designation* from Partners for a Racism-Free Community. Sieger and her staff credit the PALN program with helping them through the challenging effort to review and document policies and procedures using an intercultural lens.

GRFC has now sent two teams to PALN, and has a third group signed up for the next session beginning in the fall of 2013. “Since we only employ about 25 people, that will mean at least three-quarters of our staff will have participated in the program,” says Young. “The fact that we made sure different departments were represented on each team allowed for some good peer learning, some fast learning that wouldn’t have happened in our normal, day-to-day work.”

One outgrowth of the PALN/PRFC work was a grassroots movement that became known as the “Culture Club.” Formed by GRFC staff members as a way to infuse some relevant entertainment into the arduous policies and procedures review,

club members researched and developed presentations on the customs, holidays, and cuisines of different world cultures. “They got really jazzed about the work and started making presentations at our monthly *Town Hall* staff meetings,” Rapp says. “It was completely voluntary and a lot of fun—people were really excited about the learning.”

Rapp notes that the club’s activities were developmentally suited to a time in GRFC’s intercultural competency journey when building awareness and appreciation of cultural difference was key. Two years later, the group has progressed to a new place on the IDC, and is re-forming itself under “a more professional name, like the Diversity Inclusion Advisory Committee.”

THE CULTURE OF THE FOUNDATION HAS CHANGED. THERE’S MORE OPENNESS TO LEARNING ABOUT DIFFERENCES RATHER THAN BEING EITHER AFRAID OF OR TICKED-OFF BY THEM. —Marcia Rapp, vice president, programs

“The culture of the foundation has changed,” Rapp asserts. “There’s more openness to learning about differences rather than being either afraid of or ticked-off by them. 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.”



A new human resources policy ensures that intercultural competency and other foundation values are evaluated as part of annual performance reviews and requires staff members to report on efforts they've made to learn about and advance diversity and inclusion on the job.

New programming policies at the community foundation include one that Rapp has been advocating for some time. "Twenty years ago, I got really big pushback from the board questioning why it was important to question a grantee regarding a disparity between the make-up of their board and the populations they serve," she says.

But in April of this year, the GRCF Board of Trustees approved a sturdy diversity and inclusion policy for grantmaking partnerships that makes Rapp proud. Stating that the community foundation seeks "grantees and partners that incorporate diversity and inclusion into their mission, governance board, staff, volunteers, vendors, and constituents served,"¹⁰ the new policy will be rolled out in the fall. Rapp expects more pushback, but not from the board, which she says is "behind us 100 percent."

On the donor front, one of the groups GRCF has been working to engage as part of its PALN work is 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, while GRCF's third PALN team was going through the year-long program, Zack led an effort to convene an advisory committee that "could counsel us on the best ways to reach out to the LGBT community."

One outcome was 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. —Marilyn Zack, vice president, development

"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."

Moving Forward

Diversity and inclusion "isn't an issue that is addressed quickly," Zack says, "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."

LESSONS FOR SUCCESS

Start from the top.

Leadership commitment to learning and moving forward is essential.

Learn from your peers.

Other foundations and nonprofits offer fresh perspectives on issues your own organization may have been "recycling" for years.

Take a deep dive.

Understanding your own personal belief systems and their impacts can be transformational.

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Credits:

Vicki Rosenberg

Vicki Rosenberg & Associates
Editor

Debra Wierenga

D2 Words
Writer

Karen Gibson

Designer

John Lacko

Lacko Photography
Photography



Council of Michigan Foundations

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

Getting Comfortable with Conflict: Strategic Conversations at the Kalamazoo Community Foundation

An organization committed to community moves toward a new understanding of ownership and power.

Founded in 1925 “on the simple idea that it is our responsibility to look after one another¹,” the Kalamazoo Community Foundation (KCF) continues to fulfill that responsibility by convening and supporting nonprofit organizations in the greater Kalamazoo area. Recognizing that the community it serves “draws its spirit, vitality, and character”² from an increasingly diverse population, in recent years KCF has emphasized the importance of diversity and inclusion 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.”³ Working with a local group⁴ 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.”

Challenge

When Carrie Pickett-Erway joined the first KCF PALN team in 2010, she was senior community investment officer. As a member of the foundation’s second team, she was in a vice-presidential role, and when she returned for a third year of PALN training, in 2012, it was as president and chief executive officer. During a period that saw transitions in four of six leadership positions, participation in CMF’s Peer Action Learning Network has played a constant and expanding role in the community foundation’s exploration of diversity and inclusion.

Susan Springgate, chief financial officer, and also a participant in the first KCF PALN team, recalls that the original decision to participate in the program “started out to be hard, then got to be an easy decision.”⁵ At the time that KCF received the invitation to join the charter PALN effort, they were also working with a local organization that provided a training program focused on building awareness of and eliminating institutional racism.

“We were comparing their program with the PALN offering, and felt that we had to choose one or the other,” Springgate says. “But as we learned more about the intention



Carrie Pickett-Erway

behind the CMF initiative, we decided to do both—something that was very unusual for us as an organization.”

Suprotik Stotz-Ghosh, vice president of community development, and a member of the foundation’s second PALN team, joined KCF in 2011, when the organization was heavily invested in both programs. “It was very clear to me: this place is different,” he says. “Every other organization I had been with had all the right language about diversity and inclusion, but really didn’t do anything about it. Here, people actually work at it.”⁶

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.

So when KCF employees took the Intercultural Development Inventory (IDI)[®] assessment (see sidebar) at the start of their first year in PALN, Pickett-Erway⁷ remembers some “initial disappointment” with the results, which indicated that the foundation was in the “Minimization” stage. “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.”

Insight

“We really didn’t know what it meant, at first, to be ‘in Minimization,’” Springgate says. 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.”

AS A PERSON OF BLENDED EUROPEAN DESCENT, I HAD NEVER THOUGHT OF MYSELF AS HAVING A CULTURE. PALN HELPED ME UNDERSTAND THAT WE ALL HAVE A CULTURE THAT INFORMS THE WAY WE SEE THE WORLD.

—Susan Springgate, chief financial officer

Stotz-Ghosh says that the developmental model offered by the IDI assessment gave KCF staff the understanding and vocabulary to talk about cultural differences in a “nonthreatening way.” By contrast, he says, the anti-racism training “sent some people backwards into a place of shame and guilt for being white, really frozen in their ability to actually say anything. What PALN taught us is that anti-racist training is really for people who are already in ‘Acceptance,’ people who understand their cultural identity and how it’s been deeply influenced by this country’s history. People in ‘Minimization’ or earlier stages on the continuum aren’t prepared to say, ‘Okay, yes I grew up in a

white supremacist country and I’m probably demonstrating those behaviors.”

Stephanie Carrier, community investment assistant and a member of KCF’s third PALN team, acknowledges that the institutional racism training she went through as a new hire “really sent me way into reversal.” (The IDI defines “reversal” as “an overly critical orientation toward one’s own cultural values and practices and an uncritical view toward others’.”) “It was like, *I am part of this group of people who have done these horrible oppressive things over time. I didn’t see myself as a racist, but all of a sudden I was very aware that the fact that I walk around in this skin puts me in a group of people who automatically receive benefits they don’t necessarily deserve.*”⁸

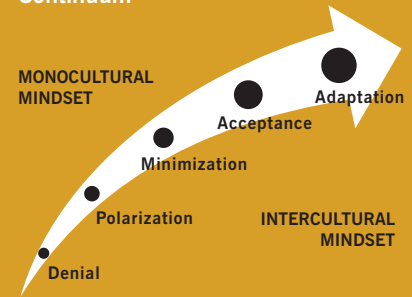
Carrier says that the results of her individual IDI assessment “very quickly revealed to me that I was still carrying some of that baggage and needed to let it go. PALN helped me dig deeper into my identity and where I came from culturally—it was just an understanding I had to move through to get beyond that Minimization stage where you kind of whitewash everything, say, ‘Everything’s okay.’”

“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.”

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.

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Strategy

As part of its annual strategic planning process, KCF undertakes an “environmental scan” of global, state, and local dynamics that affect the foundation’s work to assess the challenges and opportunities it is likely to face in the years ahead.

“We’ve been using this process for about five years now,” Pickett-Erway says. “We do a really good job of researching, reading articles in the field, studying demographic data, and reflecting on our own internal work. But looking at a recent summary report with an intercultural lens we 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.”

“It was the environmental scan of an organization in Minimization,” explains Stotz-Ghosh.

“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?*”

KCF has been implementing this strategy of “broadening the conversation” on many different fronts. One of them involves a ten-year-old inclusion statement that grantees are required to sign to affirm that their organizations are 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.”

“At a staff meeting, someone raised a question about the intent of that language with regard to the community foundation’s policy of matching employee gifts to non-profits, including faith-based organizations,” Pickett-Erway explains. Would KCF require faith-based recipients, for example, to agree to hiring practices that conflicted with their religious beliefs? “This led to a lot of internal conversations about the ‘right’ interpretation,” she says. “Many staff members voiced concerns that the statement could exclude or limit relationships within the community.”

Pickett-Erway says that KCF’s PALN experience helped them “take a step back” and initiate a series of internal “conversations” that eventually included the foundation’s board. “Smaller conversations became larger conversations,” she says, “and we saw how just having those conversations—suspending judgement and just focusing on learning from each other—helped us move forward with forgiveness, healing, and a better perspective on the issue.”

After several months of fairly intense discussion, KCF added two words, “where practical,” to the inclusion statement.

“We adopted that language because we wanted to be more inclusive of faith-based organizations that had felt excluded from engaging with us,” says Stotz-Ghosh. 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.’”

Far from being discouraged by the difficulties of finding just the right words to communicate its vision of inclusion, KCF leadership views the latest challenge as an opportunity to learn more about how it is defined within 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.”

Results

KCF leadership and staff speak enthusiastically of the changes they’ve seen in themselves, their organization, and the foundation’s relationships with the larger community over the course of their three-year engagement with PALN.

“As we’ve become more intentional about bringing the right people to the table and constantly questioning—*Do we have it right yet? What biases are we applying here?*—the level of commitment and ownership for the work is growing exponentially,” says Pickett-Erway. She sees a dedication to improving diversity and inclusion spreading to other community organizations “because they’re helping to drive it.”

I NOW BELIEVE THAT WE HAVE A FULLER UNDERSTANDING OF THE POWER DYNAMICS THAT GET IN THE WAY OF OUR ABILITY TO FOSTER MEANINGFUL CHANGE.

—Suprotik Stotz-Ghosh, vice president of community development



Suprotik Stotz-Ghosh



Susan Springgate

She offers KCF's new environmental scan process as an example. "Not only is the report, the analysis, better—we're able to identify risks and challenges that we wouldn't have before—but it has helped us to let our guard down a little bit and recognize that we don't have to have all the answers. That through these new high-quality partnerships we're creating, our community can help us. And they love having a meaningful role within our processes and the potential for improving the foundation's impact on the community."

"Our goal is community change," says Stotz-Ghosh, "and I now believe that we have a fuller understanding of the power dynamics that get in the way of our ability to foster meaningful change." He explains that the PALN experience has helped KCF move from a transactional mode with grantees ("conversations where community partners try to tell us what they think we want to hear, to meet our worldview, so we will give them money") to "transformational grant-making" that engages community nonprofits in a conversation about what needs doing and the best way to do it.

"Foundations are always perceived as 'the money' at the table," Pickett-Erway says. "One of the things that was so valuable to us about PALN was the ability to be in a room with other foundations, to have a conversation about the power of money in

relation to different biases and inequities. Our decisions are huge for our nonprofit partners; our decisions can affect whether or not they survive. To be able to talk with peers who understand that role in the community and are also trying to be more inclusive and equitable—that's been a real blessing and opportunity."

ONE OF THE THINGS THAT WAS SO VALUABLE TO US ABOUT PALN WAS THE ABILITY TO BE IN A ROOM WITH OTHER FOUNDATIONS, TO HAVE A CONVERSATION ABOUT THE POWER OF MONEY IN RELATION TO DIFFERENT BIASES AND INEQUITIES.
—Carrie Pickett-Erway, president and CEO

Moving Forward

When KCF staff retook the IDI assessment in 2013, the results showed that the organization had made a significant shift toward greater intercultural competency and was now in the Acceptance stage. "It's exciting, and we absolutely give ourselves a big cheer for the growth we saw," says Pickett-Erway. "But it's a little humbling, too. We now have 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 conversation going, a series of 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."

At a recent lunch-hour meeting, a full-to-bursting conference room of staff members shared stories of their experiences talking with grantees and donors about the intent behind the revised inclusion statement. On a flip chart at the head of the table, Pickett-Erway kept a running list of "lessons learned/best practices," which included the notes "importance of face-to-face conversations," "share your story early," "go-and-see is the best way to learn," and "impossible to get language perfect."

"We're still learning what inclusion looks like," says Stotz-Ghosh. "We're creating a culture where we're continually inviting people to ask difficult questions, to be comfortable with conflict, to share their stories. The answers are in the stories."

LESSONS FOR SUCCESS

Create a safe place and time for internal conversations. Get everyone around the same table.

Resist the desire to fix it. Keep asking questions; try to be comfortable with uncertainty.

Try, try again. If you have a goal you can't implement now, there will always be another chance to do better.

You're never 'there.' With diversity and inclusion, there's always more work to do.

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Credits:

Vicki Rosenberg

Vicki Rosenberg & Associates
Editor

Debra Wierenga

D2 Words
Writer

Karen Gibson

Designer

John Lacko

Lacko Photography
Photography



Council of Michigan Foundations

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

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.”

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.

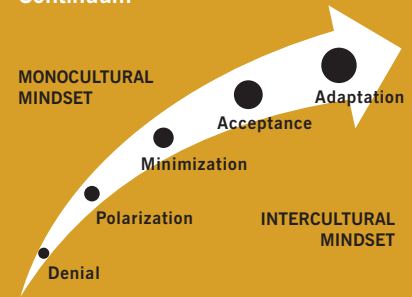
“What we learned was that we were using a sort of one-size-fits-all mentality,” explains Tabron, a member of the first WKKF PALN team and a veteran of the foundation’s decades of work around diversity and inclusion. “It was all well intended, but the tendency was to try to fit everybody into the same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

“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?’”





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.

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Credits:

Vicki Rosenberg

Vicki Rosenberg & Associates
Editor

Debra Wierenga

D2 Words
Writer

Karen Gibson

Designer

John Lacko

Lacko Photography
Photography



Council of Michigan Foundations

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