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# Difficult Conversations: Lessons Along the Journey Toward Inclusion

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## Introduction

Kelly Brown, director of the Chicago-based D5 Coalition, tells of mentioning to a friend how D5's five-year mission is to grow philanthropy's diversity, equity, and inclusion. The friend, who was then managing one of the world's largest pension funds at the height of the recession, replied: "That sounds really hard" (Brown, 2013).

It is extremely challenging work that exposes our vulnerabilities, but working for the inclusion of all people in our community is the right work and, most important, when done effectively, improves our ability to best serve all of our residents. Kalamazoo Community Foundation, established in 1925 in this southwest Michigan community nestled halfway between Chicago and Detroit, has a long history of aspiring to connect with diverse community populations.

Our 30 employees, working with assets of almost \$400 million, serve a county population of approximately 250,000. A total of 18 percent of county residents are African American, Latino, Asian/Pacific Islander, and Native American. At the beginning of this journey 13 years ago, 14 percent of our staff and 14 percent of our board of trustees were nonwhite; those figures are now 17 percent of the staff and 42 percent of the board. While these figures are useful for context, we fully recognize what is not captured in such numbers, such as sexual orientation and other factors informing this progress.

## Key Points

- This paper documents one foundation's work to become a more diverse and inclusive foundation.
- The Kalamazoo Community Foundation adopted a diversity policy and established a Lesbian, Gay, Bisexual and Transgender (LGBT) Equality Fund in 2000. In 2003 the foundation established an ad hoc diversity committee; the committee was formalized in 2007.
- An inclusion statement was adopted for unrestricted grantmaking in 2004, and was strengthened in 2012 along with the words "for all" added to the foundation's mission statement. The inclusion statement was further modified in 2013.
- The foundation proclaimed itself an antiracist organization in 2010.
- In 2012 a diversity, equity, and inclusion section was added to the foundation's annual employee survey. The following year, lessons learned were shared with donors and grantees.

Our mission is to make life better for all through leadership and stewardship of resources that last forever; our success depends upon our foundation being aware of itself and understanding, reaching, and relating to people of all backgrounds, beliefs, and abilities. These are our reflections on this journey toward recognizing and protecting the dignity of all people.

*Geared for both grantees and donors, the policy states that “a more diverse philanthropic community, and one that reaches out to all, will result in richer and more responsive philanthropy that better meets the needs of the community.”*

### Diversity Policy

Kalamazoo Community Foundation’s board of trustees approved a diversity policy in 2000. This was the beginning of “walking the talk,” as we began a structured process to fully embrace and act upon our commitment to diversity, equity, and inclusion (DEI). We believe that diversity encompasses but is not limited to ethnicity, race, age, gender identity, sexual orientation, economic circumstance, physical and mental abilities and characteristics, and philosophy and religion.

Geared for both grantees and donors, the policy states that “a more diverse philanthropic community, and one that reaches out to all, will result in richer and more responsive philanthropy that better meets the needs of the community.” It was clear to us that we could achieve excellence – not perfection – as community leaders and conveners only if we led by example, and this policy set our course. The Council on Foundations recognized our adoption and implementation of the diversity policy as a community foundation best practice.

In the same year we established an LGBT Equality Fund to support lesbian, gay, bisexual, transgender, and questioning members of our community. The endowment fund has grown from \$5,000 to \$800,000 and continues to evolve with active support of a standing committee composed of members of the LGBT community. More than \$460,000 in grants has been awarded, while the focus transitions from promoting education and

respect for LGBT issues to active advocacy and appreciation. We now feel that our community has progressed beyond tolerance and we strive for full acceptance (Kalamazoo Community Foundation, 2013a).

### Claiming Antiracism

We began our antiracism training in 2006 with a two-and-a-half-day workshop, Understanding and Analyzing Systemic Racism. The program, offered by Matteson, Ill.-based Crossroads, is locally sponsored by Eliminating Racism and Claiming/Celebrating Equality (ERAC/CE). All staff and board members completed training by 2009 and all new hires attend this workshop.

The purpose of the training is threefold: to develop a common understanding of racism and its individual, institutional, and cultural manifestations; to apply this common understanding of racism to specific situations within institutions working with ERAC/CE; and to explore opportunities for long-term educational and organizing efforts to dismantle racism and build antiracist, multicultural diversity within institutions working with ERAC/CE. A review in 2012 evaluated our progress along ERAC/CE’s six-level continuum:

1. Exclusive – a segregated institution
2. Passive – a “club” institution
3. Symbolic Change – a multicultural institution
4. Identity Change – an antiracist institution
5. Structural Change – a transforming institution
6. Fully Inclusive – a transformed institution in a transformed society

Divided by cross-functional and functional areas of our foundation, most of our efforts fell within levels 3 and 4 and a few fell into level 5; this indicates movement toward undoing structural racism. An organization at level 4 still has structures and a culture that maintain white power and privilege and that require further effort to dismantle.

Examples of efforts that indicate the foundation is moving into level 5 include:

- our revised inclusion statement;
- our community investment team's conversations with organizations about grants and systems change, launching a racial-equity initiative, and providing expertise to local nonprofits in their DEI work;
- a multicultural Women's Giving Circle led by our donor relations team, which planned events with a DEI lens and encouraged leadership to revisit our inclusion statement for grantees;
- our finance and administration team initiating questions and role-playing for DEI competency in hiring interviews and developing a plan to increase diversity of vendors; and
- a modification of our annual meeting survey questions by the marketing communications team to allow respondents to self-select their gender, and the team's engaging members of the LGBT community during the revision of our Equality Fund brochure.

The foundation adopted a resolution in 2010 claiming an antiracist organization identity and began discussions with community and national partners as a prelude to strengthening our inclusion statement for grant agreements. We are a funder of our area's annual YWCA Summit on Racism and in 2011 received the YWCA's On the Journey award, recognizing our work in antiracism.

### Intercultural Development Inventory

By 2010 the foundation was an active participant with Transforming Michigan Philanthropy through Diversity and Inclusion (TMP), an initiative launched by Council of Michigan Foundations in 2008 to improve the effectiveness and accountability of organized philanthropy in Michigan.

Peer Action Learning Network (PALN), a key component of the TMP initiative, is a yearlong immersion curriculum consisting of six one-day seminars to enhance intercultural competency as measured by the Intercultural Development

### Staff reflections

As I reflect on our journey, a resonating theme that I would like to share is the importance of seeking outside points of view from community individuals and organizational partners. Whether launching a new initiative or updating a new policy, this outside perspective can be invaluable in terms of accountability and can advise us on the components that may not be so clear to us. This outreach from the community can assist us in implementing initiatives and policies that are fully inclusive in nature and in which the community can then take ownership of; it brings to life the word "community" in our name.

– Jessica Aguilera, community investment manager

In thinking about the efforts of applying diversity, equity, and inclusion to our work – and ultimately to our personal lives – I am struck by the paradox of how this affords us a larger vision of a world getting increasingly smaller. Sustaining the push-pull of applying diversity, equity, and inclusion in our community has created challenges we could not foresee. At times our best efforts have been met with mixed reviews. Yet it is very gratifying to belong to an organization that has been clearly identified as supporting this work.

– Jeanne Grubb, donor relations officer

Inventory (IDI). Foundations send teams referred to as cohorts; our foundation's fourth cohort is attending the 2013-2014 training cycle. In an update on its progress five years into TMP, the Council on Michigan Foundations "has clear evidence that the once audacious TMP objective to 'increase member understanding and support for voluntary action to become more diverse and inclusive' has established roots in the state" (Rosenberg, 2013a, p. 1 and 9).

The IDI range spans five stages: denial, polarization (defense/reversal), minimization, acceptance, and adaptation, with two lenses: perceived orientation and actual, or developmental, orientation. Our staff's first group profile in 2010 resulted in perceived orientation in acceptance, but a developmental score in the middle of minimization. This showed a gap of 15 points between perceived and actual orientation.

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For an organization like ours that had already done a lot of reflection and with the best of intentions, we expected to be developmentally higher than the minimization stage. The gap between perception and development indicated we desire to move forward in the continuum and that inspired us to work harder.

According to a Council of Michigan Foundations report, our experience with 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 cannot see and ask questions we would not know to ask.” (Rosenberg, 2013b, p. 3). For example, this improved the annual environmental scan, part of our strategic-planning process to learn from global, state, and local dynamics affecting our work. As an organization in the minimization stage of intercultural development, we unconsciously used our own cultural lens as the only reference point and overemphasized data sources seen as expert from the dominant culture perspective. As an organization in the acceptance stage, we look outside of our organization to “diverse community partners to take a look at our data and say: What are we missing? What does this mean to you?” This requires a heavy emphasis on community-based assessments and research using

tactics such as stakeholder interviews and focus groups (Rosenberg, 2013b, p. 3).

Retested in 2013, our foundation’s perceived orientation reaches into adaptation and we show a developmental orientation just below acceptance – a significant improvement from just three years earlier.

This movement along the continuum was propelled by a number of activities. Three cohorts (16 current staff) have attended the full PALN curriculum; a diversity and inclusion team of six staff members design and oversee internal staff capacity and capability around DEI; 10 years of staff learning and development events and training; after training all staff have received assessments about their personality variables and have shared that with their coworkers so we have a clear understanding of what works best for each of us in our relationships with one another; specialized training on dialogue skills has enhanced the ability to communicate internally and with external constituents, especially around conflict; new executive leadership has developed an internal culture of excellence using feedback and accountability with a focus on results; and the new leadership has improved the decision-making process to more widely include all staff viewpoints.

In 2012 DEI was added to our annual employee opinion survey, conducted by an external human resources consultant. By 2013, scores in five areas rose from 16 percent to 20 percent based on the percentage responding above neutral; the most significant rise was the 36 percent increase in how our work was impacting the community:

- This organization has made progress recognizing types of diversity: 80 percent to 96 percent.
- People of diverse backgrounds and capabilities are valued by this organization: 80 percent to 96 percent.
- I have the skills necessary to work with culturally diverse people: 80 percent to 100 percent.
- I have a better understanding of different cultural perspectives than I did one year ago: 76 percent to 96 percent.
- My supervisor creates an environment that is trusting and open: 76 percent to 96 percent.

## Kalamazoo Community Foundation Diversity Policy

The Kalamazoo Community Foundation seeks to enhance the quality of life for all citizens in the Kalamazoo County area as the dynamic community continues to grow and change. Its ability to achieve this mission and to foster a commitment to excellence can best be pursued with a governing body, workforce, grantees, donors, and partners that include people of diverse backgrounds, beliefs, and perspectives.

The Kalamazoo Community Foundation believes diversity encompasses, but is not limited to, ethnicity, race, age, gender identity, sexual orientation, economic circumstance, physical and mental abilities and characteristics, and philosophy.

The Kalamazoo Community Foundation respects and celebrates diversity that contributes to a healthy, caring community. The Community Foundation commits its resources to change in ways that signal to groups with diverse cultures, philosophies and experiences that they are welcome partners in its efforts.

*Governance and Administration.* The Kalamazoo Community Foundation is committed to fostering an organization that respects and appreciates diversity in its many forms. To that end: the board of trustees will seek community leaders who will bring diversity and varying points of view and life experiences to the board; it will hire staff that reflect the broad diversity of the community and will provide all staff members with an opportunity to maximize the use of their work-related skills and talents; and it will retain a diverse group of product and service vendors to work with the Community Foundation and will strive to select product and service vendors committed to promoting a diverse workplace.

*Community Partners.* The Kalamazoo Community Foundation values organizations within our community that are committed to promoting the broad diversity of Kalamazoo County. It will seek grantees and partners that incorporate diversity and inclusion into their missions and strive to encourage diverse governance boards, partner organizations, and served constituencies wherever practicable. Toward this end, it will seek to assure that its grant making activities reflect and promote the diversity of the community.

*Donors.* In order to achieve the highest standards in all its activities, it is important that the Community Foundation benefits from the perspectives of all segments of the community. Toward this end, it seeks to collaborate with donors of varying means and interests to promote a healthy, caring community.

The Kalamazoo Community Foundation believes that its effectiveness is enhanced when individuals with diverse backgrounds and perspectives are engaged throughout its organization. It believes that a more diverse philanthropic community, and one that reaches out to all, will result in richer and more responsive philanthropy that better meets the needs of the community.

The diversity and inclusion work of this organization is resulting in positive change in this community: 28 percent to 64 percent.

### Inclusion Statement and Unintended Consequences

We updated our inclusion statement for grantees in 2012 to help ensure that the nonprofits receiving grants from the unrestricted funds were inclusive. Three key components of the statement were:

- “No person is excluded from agency services.”
- “The organization is continuing to intentionally increase inclusive practices.”
- “All people will be considered in employment or volunteer participation, regardless of ethnicity, race, age, gender identity, sexual orientation, economic circumstances, physical and/or mental abilities/characteristics, philosophy/religion, or any other discriminatory reason.”

*Although well intended, we soon learned from many community conversations – some very intense – how this language placed unrealistic restrictions on many nonprofits and unintentionally disrespected the framework of their organizations, especially faith-based organizations.*

This statement guides our grantmaking for nonprofits seeking responsive grants and our matching gifts program for board and staff, not grants generated through donor-advised funds, designated funds, or scholarship funds.

Although well intended, we soon learned from many community conversations – some very intense – how this language placed unrealistic restrictions on many nonprofits and unintentionally disrespected the framework of their organizations, especially faith-based organizations. A major concern about the statement was that some nonprofits cannot consider “all people” for employment, since a religious institution may not be able to hire someone from a different faith to lead services, for example. Some nonprofits expressed concern with the requirement that “no person” be excluded from direct services.

Although we had done much work in this area – attending national meetings, engaging consultants, and reading and discussing DEI work – we were surprised at the reaction from these many community partners regarding the impact on their core philosophy or faith. We learned from these conversations that pushing grantee organizations for full inclusion might unwittingly force a change in their mission or purpose, a result we never intended. We also received pushback from

our staff about the fairness to those nonprofits no longer eligible for grants.

This community and internal feedback helped us modify the inclusion statement without compromising our commitment to DEI. The revised statement asks grantees to affirm that the nonprofit organization is including all people in its organization as staff, volunteers, and board members “wherever practical.” The internal conversation also helped us articulate that the requirement that “no person be excluded from agency services” was not open to revision.

This adjustment also recognized that a local unit of a national organization can meet our desire for grantees “to intentionally increase inclusive practices” although they cannot comply 100 percent because of their national guidelines. The revised language itself created some controversy among some groups who feared that “wherever practical” was language that could be used by some organizations to stifle progress toward real inclusion. Communicating our lessons learned brought some additional pushback, but also inspired several community organizations, including a public school district, to reach out to us for assistance.

Even with the adjustment to the inclusion statement, the community reaction had a profound impact on our staff and resulted in much soul-searching. How could we have missed some of those potential impacts, especially considering how well we thought we knew our community partners? Our initial response to this experience did not satisfy all our staff, so for the sake of both morale and an improved process we held a half-day, facilitated discussion off-site for all staff. The session began with the executive team taking ownership of what had gone wrong, followed by questions and comments from the whole group. Discussion included how the board and senior staff handled the initial revision, the impact on staff of such far-reaching policy changes, and the process of communicating those changes to staff and grantees. The session resulted in decisions to survey staff about that input session itself, to share our experience with this policy change and subsequent revision with grantees and donors, and

to conduct a series of staff “Lunch and Learn” discussions on the process of policy change (Kalamazoo Community Foundation, 2013b).

According to the Council of Michigan Foundations case study:

Far from being discouraged by the difficulties of finding just the right words to communicate its vision of inclusion, Kalamazoo Community Foundation leadership views the latest challenge as an opportunity to learn more about how it is defined within the community it serves. (Rosenberg, 2013b, p. 3)

The author of this case study was present during one of several Lunch & Learns held in 2013, recalling that “staff members shared stories of their experiences talking with grantees and donors about the intent behind the revised inclusion statement.” Flip charts displayed lessons learned and best practices, which included the importance of “face-to-face conversations” and “shar[ing] your story early” and advised that “go-and-see is the best way to learn” and that it is “impossible to get the language perfect” (Rosenberg, 2013b, p. 4).

Six DEI Lunch & Learns, optional but with the majority of our staff attending, were held in 2013. Among the discussion highlights were

- examples of local nonprofit groups’ efforts to work around national organization policies and apply inclusion practices wherever “practical”;
- the need for sharing our process and lessons learned, both good and bad, with the community;
- what gets in the way of a fully inclusive culture (fear, thinking we know best, absence of curiosity, denial of differences, discomfort, lack of trust) and how can we change our culture (create new experiences, be willing to be vulnerable, align behaviors or “walk the talk”);
- stories of specific nonprofits and their feedback on the revised language and stories of other ways staff are applying diversity learnings;
- the case-study format used to review and analyze a local nonprofit organization’s approach

### Kalamazoo Community Foundation Antiracist Identity

The Kalamazoo Community Foundation believes structural racism perpetuates the inequalities that threaten the well-being of our community. To signal to the entire community that we are committed to eliminating those inequalities and eliminating racism, our board of trustees in the fall of 2010 passed a resolution officially declaring the Community Foundation an antiracist organization.

What it means: Through our work with Eliminating Racism and Claiming/Celebrating Equality (ERAC/CE), a local organization whose mission is to eliminate racism in Southwest Michigan, we have learned that claiming an antiracist identity means our organization:

- recognizes racism as a barrier to the effective delivery of its mission;
- makes a formal commitment to dismantle racism and inherent white advantage;
- intentionally engages strategies that develop a shared understanding of systematic racism across all levels of the institution;
- demonstrates growing awareness of how white power and privilege have been institutionalized within the institution and how inherent white advantage can shape the issues the organization seeks to address;
- intentionally authorizes and supports the development of durable antiracist institutional leadership capacity to dismantle racism and create effective antiracist multicultural diversity, equity, and justice;
- identifies and collaborates with other organizations doing antiracism work in the community; and
- develops processes of shared leadership and inclusive decision-making that are accountable to the people – particularly people and communities of color – who are most directly affected by the issues at hand and/or under review.

to inclusion and how that would impact its eligibility for receiving grants; and

- role playing, taking both a nonprofit’s view and our own.



### Kalamazoo Community Foundation Inclusion Statement

The greater Kalamazoo area draws its spirit, vitality, and character from the increasingly diverse mix of people who live and work in our community. The Kalamazoo Community Foundation recognizes that the future strength of our organization and this community rests firmly on its commitment to value, respect, and embrace the richness of a diverse citizenry.

The Community Foundation wants to do its part to ensure that no person is excluded from services, employment, or volunteer participation because of ethnicity, race, age, gender identity, sexual orientation, economic circumstance, physical and/or mental abilities/characteristics, philosophy/religion, or any other discriminatory reason.

Therefore, as a condition of accepting a grant award from the Community Foundation, all grantees must acknowledge their inclusion policies and/or practices by affirming the following Inclusion Statement, which appears on the Community Foundation's Grant Agreement Form: "No person is excluded from agency services; wherever practical, all people will be considered in employment or volunteer participation, regardless of ethnicity, race, age, gender identity, sexual orientation, economic circumstances, physical and/or mental abilities/characteristics, philosophy/religion, or any other discriminatory reason. The organization is continuing to intentionally increase inclusive practices."

Organizations that serve a specifically defined population or charitable class of people are not considered noninclusive or discriminatory. The Inclusion Statement applies to how an organization serves its specific target population as well as how it handles hiring and volunteer participation.

### Conclusion

Aspiring to be trusted as a neutral convener while leading community change, we bring people together to solve complex community problems. We know we cannot do this effectively with a single worldview. The strength of our organization and this community rests on our commitment

to value, respect, and embrace the richness of a diverse citizenry. In moving forward we realized that we could not wait until we knew how to get it right; it was better to move in the right direction instead of pursuing a perfect course.

Leadership was key to ensuring progress along this path, both externally and internally. Our trustees showed courage in the face of hesitation by donors and nonprofits toward various aspects of our approach. We held firm on the spirit and intent of the policy, yet we knew when to adjust the implementation. Throughout, we kept trustees and staff engaged, embracing improvements along the way, so we would all be prepared as we encountered pushback.

To further develop our intercultural competence, our team will engage in opportunities that teach us how to be self-aware; embrace people who are members of groups other than those with whom we personally identify; and adapt our mind-sets and behaviors to bridge differences in culturally appropriate and authentic ways. We will use our understanding of institutional racism to continue to identify and eliminate those practices. We will use the skills we build and knowledge we gain to ensure all of our interactions are inclusive, respectful, and equitable.

We acknowledge that we have much to learn from our community partners and from fellow professionals nationwide about our efforts toward inclusion. Recognizing and protecting the dignity of every person in our community continues to drive our efforts and commitment to building a collaborative, inclusive community. We believe our collective efforts to examine policy, attend trainings, and engage in internal dialogue and reflection has resulted in a greater intercultural competency. We believe we have had good success – we have realized we have power to declare our community as a place for all of us – and as we said in a recent StoryCorps interview, we think the best is yet to come (Kalamazoo Community Foundation, 2013c). And, we believe this journey is increasing our ability to make life better for all in our community.

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