



INTERVIEW WITH COLLEEN MITCHELL – MAY 22, 2012

Our State of Generosity, a project of the Dorothy A. Johnson Center for Philanthropy (JCP) at Grand Valley State University (GVSU), in partnership with the Council of Michigan Foundations (CMF), Michigan Nonprofit Association (MNA), Michigan Community Service Commission (MCSC), and GVSU Libraries' Special Collections & University Archives present:

An interview with Colleen Mitchell on May 22, 2012. Conducted by Kathryn Agard, primary author and interviewer for *Our State of Generosity*. Recorded via telephone. This interview is part of a series in the project, *Our State of Generosity* (OSoG). OSoG is a partnership of scholars, practitioners, and funders from four institutions – the Johnson Center; CMF; MNA; and MCSC – that collectively form the backbone of the state's philanthropic, voluntary, and nonprofit infrastructure. OSoG's mission is to capture, preserve, analyze, and share the developments, achievements, and experience that, over a period of 40 years, made Michigan a State of Generosity.

Preferred citation: Researchers wishing to cite this collection should use the following credit line: Interview with Colleen Mitchell, 2012. "*Our State of Generosity*," Johnson Center Philanthropy Archives of the Special Collection & University Archives, Grand Valley State University Libraries.

Abridged: The following interview has been edited to assist readability. Extraneous verbal pauses and informal personal conversation not related to the topic of Michigan philanthropy have been deleted. Footnotes to the transcript have been added clarifying any factual errors in the memory of the person interviewed.

Text of the interview questions are as asked. Individuals interviewed have had the opportunity to add or edit their answers in order to provide their most accurate answers to the questions. For these reasons, the edited transcript may not exactly reflect the recorded interview.

Kathy Agard (KA): I recommend retirement. It is worth working for.

Colleen Mitchell (CM): Well, God bless you. You are a beacon of light and encouragement.

(KA): My garden is keeping me busy. Life is good.

(CM): Well I am so happy to hear that but it sounds like this project is a fabulous one and did you say Susan is on the call too?

(KA): Yes, Susan is here with me and I am going to let you talk to her for a second so you can get used to her voice.

Susan Harrison-Wolffis (SHW): Hello Colleen, this is Susan.

(CM): Hi Susan. It is nice to meet you, at least through technology.

(SHW): Kathy is going to do most of the questioning and talking for our time frame and we don't want to overstay our welcome here. So if by chance you and I don't get to talk a lot I am going to ask your permission to give you a call later and we can fill in some pieces. [00:01:00] I am going to be doing the more personal part but what is really important is to get you on the record of talking about some of these things, so I will try really hard not to butt in.

(CM): No worries to both of you and Kathy you probably had a significant hand in even teeing up my name on what might have been a very lengthy list of qualified people to even share a thought or two so I am really honored and humbled by the invitation, so thank you.

(KA): Nice of you to say but you were at the top of our list Colleen because we know you will be reflective of what is happening. Because Grand Valley is a research university, legally I need to say that this is Kathy Agard and Susan Harrison Wolffis interviewing Colleen Mitchell on May 22 of 2012 about Our State of Generosity. So you know, we are recording it but we won't use anything, Colleen, without your permission [00:02:00] on the web site or anything else. How much background do you have or how much would you like before I start asking you questions.

(CM): I don't have much background about it other than I saw Jim Edwards at a philanthropy function not too long ago and I think he had just seen you on this project and I said, "So how are things." And he said, "Well I've just come from talking to Kathy and she's working on..." and I thought "Oh my God, that sounds like such an interesting project." He gave just a two sentence summary about this publication, but I would like to hear it just from the horse's mouth as they say.

(KA): And it will help you to have a little context for what we are looking for. Just before Joel and I retired we went to a series of meetings where people were talking about the history of things in Michigan like MCFYP and those kinds of things and we both looked at each other and we said, "Oh wow, we were at those meetings and that is not what we remember." I had known I was going to retire said, why don't we, after we're retired and get settled, write a book from the two different perspectives, his as the grant maker for a lot of these projects and my, on the ground, you know, doing some of the work. So we went to Kellogg and Kellogg has given us a half million dollars, but their interest was to develop, instead of a history book, a web platform that could be interactive and also be available as a resource to, in particular, their international grant makers. McHale said he was interested, for example, for his Brazilian group, that they would have a place that they could come and find out how-to's and lessons learned and those kinds of things. So what we have is really a two-pronged project and the first [00:04:00] part is an actual, collection, I think of it



as the research collection of data part. So we are scanning in all of CMFs documents, Michigan Nonprofit Association, Michigan Community Service Commission and the Johnson Center and...

(CM): What a resource that in itself will be. You just knocked my socks off with part one.

(KA): The University has the capability of having it be scannable and searchable, so that in the future somebody can come in and type in Michigan Tax Credit and they can go to the CMF board meeting where it was discussed, then they can click over and see the case statement, you know, that was done by the political people and then we are hoping to interview Blanchard and Engler about it, so... We are putting all of that together and it includes audio and video tapes of some of the people who were involved [00:05:00]. Certainly this tape will become a part of that collection and then you can also edit it if you would like. We are friendly interviewers. The second part is the development of materials for the web platform and those are going to be shorter pieces about five major themes and I think maybe Robin sent over to you the kind of outline of what we are going to be writing about.

(CM): Well, I didn't really understand at the time, but now I can see the servant leadership, human financial knowledge, grant and public policy, the global implications and then what is important for others to know. Are those the five themes?

(KA): Those are the five themes that will go on the platform and originally we were going to do it as a straight history, you know, this happened at CMF in 1970 and this happened in '71 and our advisory committee wanted it to be revamped under these themes. So we are just now working with the theme approach and [00:06:00] it is working pretty well for us.

(CM): When you develop a theme with this advisory committee, did anyone offer or maybe it is imbedded in one of these five themes, this notion of leading edge, thought leadership, or risk taking? If I could pick one word of Michigan philanthropy and the lessons and what it represents it's always been about leading edge, you know, exploring the outer limits, pushing the envelope, but in a thoughtful, planful... and I don't see that anywhere, am I missing it?

(KA): Well I kind of have it tucked under the servant leadership under the "be fearless." Let's talk about that some more. Part of what we would like to do then is to take clips of this and if I write, let's say, a little two-page essay about this idea of being bold and not being afraid, and that we then could click over to comments from you [00:07:00] and comments from other people, kind of like both examples. Then Susan is writing profiles of the folks who are involved to really get at the more personal part of how do all of us wander into this work and what is sort of the nature of the people who have been involved. So as more of an outsider, Susan is going to be able to have that perspective and then we are going to have that kind of history. So yeah it is really an exciting project.



(CM): Kathy, you have just done so many interesting, exciting and long lasting contributions to the field and then this is, beyond putting the cherry on the top, this is creating a whole new hot fudge sundae. I am really excited for you. I am excited for Michigan. This is really, really cool.

(KA): I've had all the fun jobs. It is really true.

(CM): This is fabulous. [00:08:00] I am humbled you are even taking the time with me, so thank you. How can I be of help?

(KA): I will dive in under some of these themes. I know you have great insight into the field and so if you have other things you want to add in, don't feel like you are constrained by my questioning. Why don't we go with this notion? You have been a corporate grant maker, you were on CMF board, and you are now working with families. You have been in Michigan, you have been outside of Michigan. We tend to think of Michigan as having a unique culture here. Could you talk little bit about the Michigan culture of philanthropy and what you see as the threads and the, you know, what makes it different what makes it strong, sort of characteristics of it.

(CM): Well, the culture Michigan philanthropy is distinct. It is distinct in the quality of the relationship that leaders [00:09:00] of philanthropy have with each other as pure funders, but also in the depth of relationships that they have with their not-for-profit partners and the respectful, mutual, empathy and care for the relationships they enjoy with one another. There is tremendous respect afforded each other, both grantmaker and fundraiser. I think that the culture of the quality of the relationships of philanthropists here in the state and that is trustees, the peers, the staff's trustees, the staffs of not-for-profits, I think it is because people genuinely care about each other here. That is why when I got my start in philanthropy in Chicago, had the good fortune to be invited into Michigan and help Whirlpool Foundation think through their global strategy. Then I left Michigan [00:10:00] and spent a decade in Boston but deliberately chose to come back. I had an option to go other places but I made the choice to come back to Michigan and the choice to come rejoin Michigan philanthropy. I think it was due to the deep-rooted footings of the relationships that I had built over the years that became a friendship. I saw the quality of the work that people were affording each other, you know, generate fantastic outcomes of the work of philanthropy but there was a genuine love and care that each other shared with one another and I missed that. I missed the relationships that I had the good fortune to develop and be a part of and the friendships that blossomed from that. I think that's one of the unique aspects of why Michigan philanthropy truly does make a difference.

(KA): Colleen, where do you think [00:11:00] that comes from. How did that get set as opposed to other places that didn't have that?

(CM): I think that in Michigan you have this wonderful simplicity of independent, large-scale, well-endowed foundations that take their stewardship roles seriously; they're thoughtful, they are



planful, they are focused. They hire the best and brightest and they get busy in being inclusive and inviting people to participate in making their guidelines come to life. I think those beacons, at least for me in a much smaller foundation that I was responsible for, they were the North Stars. They were the beacons of light that gave me an example; they led by example. The risk taking that I think is part of the culture [00:12:00] of Michigan Philanthropy, the leading edge thought leadership, exploration, discovery. It gave me the confidence that I was part of a larger community and it was a conducive environment for me to step out and help my organization explore, what it meant for us, being risk taking and staying relevant and really kind of pushing the limit. I think that there is room for all sizes and shapes of philanthropists in Michigan and I experienced the culture of philanthropy in the state to be wildly respectful of each other. The various ways that people define how they want to make a difference, the various ways they show it, the various types of organizations but there is this leadership cohort that [00:13:00] is always providing leadership by example, giving you the encouragement to keep doing and going, testing it and trying it out yourself. I generated confidence to go there because others around me were doing so.

(KA): Can you tell us a little bit about... we talked with Carolyn Bloodworth who is the only other corporate grant maker that we talked to. Can you tell us what it is like to be inside a very different structure, a corporate structure, but also inside the philanthropy world and that corporate grantmaking point of view.

(CM): For me, the corporate grantmaking point of view was developed inside out and the outside in. What I mean by that is, the strategy for our grantmaking was developed by getting an understanding and keen sense of the strategy of the corporation. Where were [00:14:00] those particular social issues out in the communities around the world where Whirlpool operated? What types of social issues were causing obstacles or causing constraints to Whirlpool and its employees? Being successful as an enterprise operating and working, and employees living in these communities where we operated. So we tried to get our arms around the company strategy and the company footprint in these communities but then we also tried to understand the voices and the perspectives of those that we were trying to serve. That inside-out, outside-in, dual lens, if you will, was the catalyst to our board of trustees approving our own strategic initiative at Whirlpool Foundation, which became global.

It was about inviting the [00:15:00] perspective of women's views on work and family life, from their perspective. Why women? Because women were the individuals who were on the manufacturing line making the product, women were the purchase decision makers when they were out at retail, trying to buy the product. They were also the people who were using the products once they were in their homes and we thought, you know, we need to really understand women's perspectives to help inform our grantmaking program because women are absolutely key in society, key to our community, key to the success of our company. So it became a fairly obvious starting point for us to hone our strategy and create this strategic initiative that queried



women's views that became not only insight for our grantmaking [00:16:00] but it became a published piece of critical research that we shared globally. We conducted the research in North America, Western Europe, and around the world; it was translated into seven different languages. It not only helped made us better grant makers in terms of really honing the perspectives of where we should place our social investment but it also updated the companies views and updated frankly, society's views on women's roles in society, in the workplace and within their families. There were some fabulous research nuggets that came as a result of the global research and it just felt like we had gone about creating our grantmaking strategy in more of a thoughtful way by inviting the voices of those that were actually serving.

(KA): And doing that work inside the culture of Michigan, were there ways that the systems that were in place, CMF, [00:17:00] MNA, were they helpful, not helpful, not relevant, or relevant. To what extent did it help or hinder the work or no effect at all?

(CM): It helped the work, in that, I recall the Council of Michigan Foundations inviting us to come and give a briefing at one of the annual meetings. It was a well-attended session by other peer corporate grant makers. This was back in the early '90s, many years ago, but now today, these are called signature initiatives or signature programs, there is a lot of branding connotations, etc. But back in the early '90s, when we commenced this work, there really wasn't a lot of strategic initiatives going on by corporate grant makers. If there was any social research being done, it was being done strictly at the university level and the results of which were for those [00:18:00] who had done the research. It wasn't put out on CNN, you weren't seeing interviews by the Wall Street Journal or The Financial Times, and indeed that's the sort of visibility that our research at Whirlpool Foundation received. So CMF wanted us to make sure that even if we were in the White House doing briefings, we were in the EU in Brussels doing briefings, we were in the Glass Ceiling Commission, the US Labor Department, we were being invited many different places to share our learning, but I really credited CMF and the leadership at that time for understanding that we had maybe one particular way to listen to the beneficiaries that our grantmaking in a way that was new at that time and different and would we be willing to share that practice with other peers. We felt very humbled about being able to do that and so I think that the CMF organization was part of the network [00:19:00] of getting the word out to update the grantmaking paradigm.

(KA): Great. Remind me when you were on the CMF board. What was going on during that time?

(CM): Oh gosh, Kathy, you're taking me back....You know what was going on at that time? It was the stuff you were doing, so in the mid-90s it was when the community foundation initiative of Michigan took off with the Kellogg grant. Russ Mawby was still president at that time and his leadership had a tremendous influence on work that CMF was doing and the fiduciary role they were providing, to create the seedling efforts and to be that catalyst and support. The whole youth advisory council initiative was being birthed and you were directly involved in both of those efforts. So that is what I recall [00:20:00] and I was so happy to be serving on the board of CMF at



that time because again, there were really smart people, both within CMF and within the larger not-for-profit foundations, independent foundations and there was a genuine willingness to explore new ways of making an impact and to put up seed capital and then get the right leadership horsepower behind it to actually make it happen. Make a multiyear commitment so that you could focus on, you know, rolling it out, replicating it, scaling it, showing some early wins and then getting people then around the country motivated. That is what is so exciting about Michigan and one of the catalysts for me to come back to the state for my philanthropy practice because this is like an incubator for new thinking, new work. Not all of it always works, [00:21:00] but that is always part of the practice of being a pioneer and Michigan philanthropists are humble enough and hardworking enough to sit back and say what worked and what didn't and to learn from the shortcomings or where it fell short and to always build on it.

(KA): What has been your awareness, have you been involved with MNA enough to be able to comment on its role.

(CM): I haven't. I know them briefly; I have seen them at conferences. I don't know their work very well at all. In fact, I am not even sure when I was on the CMF board that MNA was even an entity yet.

(KA): No. I think we were doing grantmaker/grantseeker during that period and hadn't yet...

(CM): Oh yes... and then I went into the P & L sales and marketing side of things in Boston and so I kind of missed the birth of MNA.

(KA): We won't go there then. [00:22:00] The next thing I wanted to ask you about was your current practice and what you are seeing in the world of family philanthropy. Again it could be informative to people in other parts of the state, other states or other countries who might be interested in doing something on their own or doing something with their own wealth.

(CM): Sure. I am seeing a lot of excitement in family philanthropy today; it is one of the catalysts for me forming VENTURE3Philanthropy. I think, first of all, most of this generosity in the country is given through and by individuals. If you include family foundations, bequests, individual giving, I think it is up to 86 or 87% of the near 300 billion dollars given annually in this country to charity. So a lot of private individuals have influence on affecting social issues [00:23:00] in this country and that is a very exciting dynamic. Secondly, there is a lot of wealth being generated today and there is a lot of wealth being transferred today. So let me take the first one. The original wealth creators that I am working with, many of whom are generating their wealth in technology-based platforms so they are known in their business circle and by the public as innovators, as risk takers. They become successful, they have liquidity events that have generated the funds for their philanthropy, but they want to go to market with philanthropy in a way that is aligned with the identity that they have amassed over a period of time as business leaders. So I see a lot of



willingness, openness, lots of questions and an invitation to partner with them, thinking through their giving strategies in a way [00:24:00] that is more cohesive and more aligned to how they see themselves, their identity of themselves but also the image that they enjoy in the community. That is an exciting dimension.

(KA): Colleen, can you give us an example without giving up, keeping it anonymous, a type?

(CM): Sure. One of the clients that I work with is an investor in a very successful technology platform that recently went through an IPO (initial public offering). So there was a liquidity event and that influx of cash was part of their overall ongoing wealth management plan that their wealth advisors are helping them with, so the goals of capital preservation, tax management, risk mitigation, as well as estate planning. What I was invited [00:25:00] to bring to that conversation around the table of advisors, it was the balance of a living legacy by giving today as well as a lasting legacy of putting footings of this wealth in their private foundation. We created an endowment so they could experience the joy of giving today and have some largess for their daughters who are also trustees to continue their family legacy, continue the family values around innovation and risk taking. That is how the wealth was generated. So they have created this private foundation, but they are also creating a donor-advised fund to compliment the private foundation, offering additional vehicles for their children and subsequent generations to do grantmaking that may be outside the focal areas that the original wealth creator and their spouse have focused their private foundation on. Thirdly, this family overall has asked for my help in crafting a portfolio [00:26:00] strategy that sets aside a portion of their giving for outright charitable gifts, a portion for event sponsorship, disaster relief and their church. Then we are carving out another portion for a strategic grant that has very specific stewardship requirements that are developed with the not-for-profit partner, so the not-for-profit never feels like the donor is putting some burden on them. These are mutual goals and objectives and metrics and targets that are represented [00:27:00].

Thirdly in this portfolio, we are carving out a modest portion of the footing for impact investing. This is one of the new trends that is taking these wealth generators who have made their wealth in for-profit enterprises and inviting them to consider what might have traditionally been named philanthropy, but to continue to invest in for-profit companies, but these companies have a social mission. We don't take the entire endowment and direct it this way, but we take a portion of it because of the opportunity to make investments in companies that have a certain social mission in the funding areas that compliments the grantmaking side of their philanthropy. So they kind of redefine philanthropy that it is all about care for others, but it can also be done in for-profit models, or it can be done in not-for-profit models [00:28:00]. They are also looking to link up with funders collaborative and they are also exploring where it might make sense to involve the public sector in one particular social issue that they are funding. So, a wide array of definitions exist of how to construct this portfolio, a system of philanthropy. It is frankly one of the client profiles that best reflects my value proposition of VENTURE3Philanthropy, which is helping donors who are



eager to understand what is happening at the nexus of the sectors, navigate these intersections, understand these new hybrid models that are surfacing, and then help them think through and discern a strategy relevant for their foundation.

(KA): How useful are the current infrastructure organizations to [00:29:00] their work in the same way that the infrastructure organizations, CMF, MNA were to more traditional philanthropy.

(CM): That is a great question, Kathy. You are actually asking a question that is right now one of the leading buzz conversations in the field that I am operating in for the social entrepreneurship space... I don't know if you have seen, the Gates Foundation recently funded a publication that the Acumen Fund has created with the Monitor Group. I think the title of the report is called "From Blueprint to Scale: The Role that Philanthropy Plays in Mission Driven Investing" [00:30:00]. In the report, to your question, it talks about this delta that currently exists in intermediaries to support the evolution of the field. It is the intermediaries which exist today, the Council on Foundations, Independent Sector, the Regional Association of Grantmakers, etc.; fabulous organizations, longstanding, brilliant leadership, great programs, worthy missions, not keeping up fast enough. The field is changing so fast that whether these current intermediaries need to evolve to augment their footings and their roots of their missions to grow and evolve with the changing times or whether it is too dramatic a leap. Those are discussions that every regional association and national intermediates are having [00:31:00] with their boards as we speak. But this one report from the Gates Foundation, at least they are suggesting, and I am not sure how I feel about it. I am not in this really wildly enthusiastic about adding more not-for-profits to the mix of 1.3 million that currently are looking for funding. But they're suggesting new social funding, social investment, social impact intermediaries that are sector agnostic are needed in the field because those who are leading the intermediaries currently active in this field have come out of their own disciplines and paradigms and they don't have the background to go where the field needs to go. I am not sure I agree fully, but that is just my opinion.

(KA): I know it is one of the hot issues right now... a side conversation is if you think about the current organizations having been in response [00:32:00] to the '69 tax act, I guess the questions is whether the current organizations can change in response to this change... or whether in fact we are going to need new organizations.

(CM): That is one of the fundamental questions that the Monitor Report had keyed up.

(KA): Can you pinpoint the nature of the leadership in Michigan. One of the things that we want to explore is this whole idea of leadership, both who some of those people are and the qualities that they have brought to their work that would make them relevant or did make them relevant in the past.



(CM): [00:33:00] Names like Russ Mawby, Dottie Johnson, Kathy Agard, Joel [Orosz], Jim McHale. I would offer Tony Berkeley. Maybe that is a name that maybe isn't so obvious. I think he is at the threshold of creating something enormously powerful and impactful and is a game changer and I think it is going to be another beacon of light. It is amazing to me that the W.K. Kellogg Foundation, I don't know, that is just part of the DNA there, but they seem to be of the very large foundations in the state [00:34:00] consistently unafraid to take the next step; to not sit on their laurels, to not be happy with what they are currently doing or the laurels of the past, but constantly say "how can we continue to be as effective as we possibly can?" I think it is probably a combination of the longstanding trusteeship. In that regard, I think Dottie Johnson has done an enormously impactful philanthropic leader for 25 years on the board of the Kellogg Foundation. You can't duplicate what happens for the benefit of an organization and those that they serve when you have that smart of leadership over that period of time, that engaged.

(KA): Talk about Tony Berkeley. [00:35:00] He would be a new name and a new character to add to the mix.

(CM): I could sing songs about all the other people and I would love to if you would think it would be helpful. But Tony is at the top of my mind because he and I have done some recent work together over in Chicago presenting an overview of the continuum of ways philanthropists, through private foundations, can make a social impact. It is not just grantmaking anymore but it is a fabulous toolbox that crosses the threshold of pure grantmaking and it represents part of the five percent distribution, all the way to purely making a profit and everything in-between of this blended, double-bottom line, triple-bottom line impact [00:36:00]. Tony was a Title One child and through that school lunch program understood the difference that the generosity of others can make on one's life; the generosity through the currency tax revenue, the generosity of the currency of donations, the generosity of the currency of private wealth. No matter what the sector currency, he was able to quickly deduce that "boy, I have a shot at a better life because of the generosity of others" and he became a university professor and continued to evolve his place in that generosity spectrum.

Today he has the pleasure of leading and directing the mission-driven investing initiative of the W.K. Kellogg Foundation which is just three [00:37:00], maybe 3-1/2 years old. He has kept a journal online, it's almost in kind of a blog format, that describes the journey that he went through with Tom Reese, his predecessor. The two of them took the professional risk, went to the president, went to the board and the president and the board signed on and they devoted over \$100 million in investment in for-profit companies who are making money and offering a service and a product in companies that benefit children's families, and of course you know well that that is their focus on their grantmaking side. Kellogg Foundation probably hasn't gone as far as say F. B. Heron Foundation where they have literally taken down the walls, the organizational structure that divides the grantmaking program staff from the impact investing endowment management staff, [00:38:00] but they are close. They now have meetings where these silos of grantmakers vs.



the investors that manage the endowment, those vertical walls are coming down. They are meeting, they are sharing learning out of what these for-profit companies are learning from delivering the fresh fruits and vegetables and this distribution model in the four or five states in the south in making sure that these children get a more nutritious lunch. They are deriving the learnings out of that for-profit investing and they are sharing their learnings with their program officers who are investing in not-for-profits who are trying to serve nutritional benefits and programs for children and families.

He is out there really doing it. I think he is feeling supported to just get out and stick his neck out and take that risk because there is a history at that [00:39:00] organization, they have a culture as you well know from your professional experience and the initiatives that have started as little seedlings that you really grew into a mighty oaks. Tony is now at that precipice, like you were so many years ago, in driving this latest initiative. So many, many people are watching him, talking about him, he is known internationally now, he is being asked to speak internationally because people can see Tony and the W.K. Kellogg Foundation not just talking about it, not just writing reports about it but actually doing it and sharing the learnings from it so it is giving people encouragement, too.

(KA): I think what I hear you talking about is this sense of being able to be supported in taking risk sort of throughout the history and then going into this whole new field, right? [00:40:00]

(CM): I think this field itself, one of the lessons that the field, I would certainly think that there is an invitation to embrace a lesson here that without remaining open and without being willing to set down even those models and policies and approaches that proved to be so successful throughout your career, without being willing to resist the success models on a pretty regular basis, just make sure that they remain relevant and fine-tuned, calibrated to this evolving landscape. I think that my colleagues in the field get rooted into what works and where their comfort zones are and kind of hunker down. I think that the speed upon which changes are flying in the field, [00:41:00] the skill base that is needed to stay relevant and to really guide philanthropic organizations for continued relevance and to guide the staff and to really keep honing the definition of what making a difference means and what a social impact really means. If you don't stay out in front of that, you could very quickly be rendered irrelevant by the very donors you are needing to cultivate. Or the donors or the foundations that are making the grants will find that their paradigm isn't keeping pace with the leadership that their not-for-profit partners possess. In fact one of my clients is being taught about impact investing from one of their not-for-profit partners who has a not-for-profit charitable footing but they've added for-profit enterprises to their business model so that they can continue to diversify their revenue stream and stay relevant [00:42:00] with where the markets are going. It is pretty cool stuff.

(KA): At the end of our time we will ask you what we haven't asked you.



(SHW): How are you doing for time [00:44:00] Colleen?

(CM): I have about another 15 minutes.

(SHW): If we run to the end and aren't finished, I will call you.

(CM): Call anytime.

(SHW): My part is to show through personal stories almost who you all are. All of you people who are in leadership and who are in this Michigan world of philanthropy. Maybe you could start the story about how you ended up, or started out in, philanthropy. What drew you there? Goals? Experience as a child growing up. What brought you to philanthropy.

(CM): Our family culture, Susan. Though my parents were not philanthropists, they were active in the church and they were active with their time in the community. They were huge volunteers. [00:45:00] They made available for my brothers and I, experiences as a family to volunteer in the community and that was just part of what we did as a family. It wasn't an expectation, it wasn't something we were supposed to go out and do on our own. It was often how we spent free time together, volunteering out in the community for a wide variety of different organizations, particularly the arts. That is how I would say I got my footing in the field of caring for others, so to speak, or love of others. But when I went to college I wanted to work on a large-scale in some way so I went to Capitol Hill and became a research associate for a bipartisan caucus. I could see where I could make a contribution, things of social importance by staying part of the policy arena. [00:46:00] When I got to Capitol Hill and I worked there a few years, I was frustrated in my early 20s with the speed upon which public policy formed. So I went into fundraising for a major university and really enjoyed it. But I could also see value on the other side of the fence, so to speak. So after I had spent time [00:47:00] fundraising for a couple of arts organizations, I was invited to join a corporate foundation in Chicago and they gave me responsibility for their public affairs division, their corporate giving program, and their private foundation. What I did is I pulled the whole thing together in a system and took it global. That was their presence, that was their footprint. That was in the mid to late '80s and that was different for that point in time, thinking about it systemically and looking for interdependent and interconnecting parts and involving employees and involving grantmaking for social issues that had some meaning and relevance for the corporation that was taking shareholder equity and placing it out into the community.

From there I went to Whirlpool Foundation, I talked a little bit about the global initiative there around women and families. While we were doing that work, one of our trustees was head of [00:48:00] Kitchen Aid, and said why don't you come join the P & L side of the business, the sales and marketing side, and help us make the money that the foundation is giving away? I knew nothing about sales management, brand management, marketing management. She gave me a \$220 million dollar P & L, the entire cooking business globally for Kitchen Aid brand and it was one



of those “just dive in.” My first assignment was a cross-category new product launch and at that time the company was doing product launches only by single categories. We said, “let’s take this from the consumers’ point of view.” Like we had gone out and asked the beneficiaries of our grantmaking program [00:49:00] I wanted to always listen to the person that we were there to serve. In doing so it was, at that time, wildly different, first ever, the team did an amazingly great job. I got additional responsibility, went on to Boston, ran Bose Corporation’s \$300 million dollar global P & L for their loudspeaker business. I went on to work for Copenhagen, Denmark based company and ran a Bluetooth headset sales driver and so just really did different things.

But all the time, the 12 or 15 years that I had hopped out of day to day philanthropy is when I broadened my philanthropic role. I no longer was a fundraiser or a grantmaker, I became a trustee and I became a donor. My husband and I set up a modest endowment at our community foundation at the time and involved our daughters in our grantmaking. We had a family meeting and we got together and took a portion of what we gave annually [00:50:00] and decided on it together. So it was true those experiences that actually brought me back full-time to philanthropy and I had the pleasure in 2007 to serve as the president of NorthShore Foundation, which is an operating foundation for a health care system. After the team raised about \$50 million dollars through the Great Recession, I wanted to devote the rest of my life to philanthropy. The only way I could really ratchet up my service, through really a service calling that I felt at that time and still do, with 30 years’ experience, in all three sectors, and wearing a variety of philanthropy hats, I knew I had something that [00:51:00] I could share that others might benefit from.

That was really the catalyst for founding VENTURE3Philanthropy. The genesis of the name of the company was catalyzed by what is happening in the field. It is a big adventure out there and a lot of risk to it and there is a lot of hybrid work happening at the intersection of the three sectors. Due to a lot of the growth and prosperity for making a difference in this world, I think it is going to come through a lot of these new innovations. I wanted to be a part of it, and I wanted to be part of making a modest contribution by catalyzing and inspiring and empowering families and their vision.

(SHW): I have about a million more questions but we only have a few more minutes. I will ask the questions that both Kathy and I have which is, when you were thinking ahead to this interview and this conversation, did you have in mind something that you wanted [00:52:00] to pass along, some lessons learned or things that we have not asked you that you had wanted to talk about.

(CM): Yes, that very last theme of what is important for others to know. The thing that immediately jumps to mind is an initiative, and we are still waiting for Grand Valley State University’s IRB to give the green light, but it is something that Joel [Orosz] and Miles [Wilson] and Jim Edwards and Dottie, we have been talking about it for about 18 months and it is this topic of the definition of philanthropy. The way I have lived it and interpreted it is the love of others, care for others, but it struck me that the work that we have all been involved in doing for so many



decades is enabling others wellbeing and their lives and affecting the quality of their lives. I don't know if we as philanthropy leaders have always kept that same perspective of well-being about our own lives [00:53:00].

My lesson, if you will, or my invitation to those today and those who will follow behind us is, it is so easy to embrace the passion of philanthropy; it is such worthwhile, such rewarding work to "love and care for others." But if we don't set aside time on a regular basis to step back and to really ensure our own wellbeing and our own love of ourselves and our own self-care of others. How much sleep are we getting, how well are we eating the right things and getting enough exercise and being the best that we can be as people, so that when we step into these roles as leaders that we bring the benefits of rest and creativity and risk taking and wellbeing to the [00:54:00] roles that we have in philanthropy? That wellbeing could be cascaded throughout our organization and we are not burning the candles at both ends and we are not pushing ourselves and our staffs to work 18 hour days, 6 days a week. It is just not a sustainable strategy. What is fascinating to me is when I stepped down from NorthShore and I had the opportunity to sort of step back deliberately and kind of think this through myself, I talked to Joel and Dottie and others and there were some folks that I reached out to who had been in the field for a long time that I greatly respect and they privately shared with me, "yes, I wish I had a sabbatical, yes, I do a terrible job at caring for myself while I am caring for others." But when I talked to them about the research that the Johnson Center of Philanthropy was doing about the well-being and would they be willing to be interviewed either [00:55:00] privately or be a case study, they immediately said, "That isn't relevant to me. That is not my experience, others are probably struggling." From friend to friend, I got this wealth of insight into how strung out they are and how burned out they are and how they need a rest, yet when it came time to go on the record, everything was perfect. I thought *wow, we really need to do this research.*

(SHW): You need to do seminars on this. You are such a passionate speaker and so inspiring.

(CM): Thank you. We will see. Kathy, if you have any insight on how to affect the IRB, let me know. But as the principal investigator with Jim Edwards, this went into the IRB in January and it came out in April, with 12 revisions. We are still revising [00:56:00]. It is just a labor of love.

(KA): They're miserable. They are particularly miserable when it is not something that is within the norm of the university. I mean if you were doing a science experiment you wouldn't have any problem at all, but when they don't know what to do with something, their way of coping is by asking lots of questions. When I went to the University, I thought to myself, one of the things I know is that I don't belong inside of a big organization. Having worked for a hospital where we at one point were told that we had to competitively bid advertising and there was only one newspaper in town. Well the university is much that way and Grand Valley is less that way than other places so what you get is the benefit of the [00:57:00] stamp of approval. Once you get it you know you are safe but they put you through your hoops to get it.



(CM): I am a patient person, but I am sort of like “C’mon coach... let me in!”

(KA): I remember a conversation when my kids were teenagers and I was talking with Dave Egner about it and I said it is really sad when you are out doing all kinds of youth advocacy and you are missing your own kids play at the school.

(CM): I hear you, my friend. Well this became all “let me in, coach, let me in,” when I sat the week before last in Chicago listening to Ginny Esposito from the National Center of Family Philanthropy when she talked about her latest research on the attributes of the CEO, from the family philanthropy CEO and one of the attributes was not enough self-reflection, care for self, wellbeing, [00:58:00] they actually used the term “friendly”. Oh my goodness, we need to get this work done.

