



INTERVIEW WITH KATHRYN AGARD – APRIL 23, 2013

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 Kathryn Agard on April 23, 2013. Conducted by Joel Orosz, managing editor for *Our State of Generosity*. Recorded at the Johnson Center for Philanthropy in Grand Rapids, Michigan. 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.

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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.

Joel Orosz (JO): Talking with Dr. Kathryn Agard - Kathy Agard. Kathy, would you provide us with a quick overview of the many roles that you’ve played in the Michigan philanthropic community with the Michigan Community Service Commission, the Council of Michigan Foundations, Michigan Nonprofit Association, and the Johnson Center for Philanthropy?

Kathryn Agard (KA): I like to be on the other end of the interview better. [Laughter] Yes, I have been involved with all four organizations, starting with the Council of Michigan Foundations with the Michigan Community Foundations’ Youth Project, MCFYP. Then I moved for a while to the Community Foundation for Muskegon County and from that, I was engaged with, actually, the Michigan Nonprofit Association from the early time when CMF had the Grantmaker/Grantseeker Conference. That morphed and was given over to MNA. I watched MNA and then [00:01:00]

Kathryn “Kathy” Agard

served on the board for a couple of years. Then the Michigan Community Service Commission was involved in some of the legwork in getting the infrastructure in place in Michigan for the Commission to get organized. Then, of course, the Johnson Center – I've been engaged as the executive director for five years and just have retired from there.

(JO): Of course, we know that there's an hour at least in each of those, but what I'd like you to do now is to talk to us about MCFYP, the Michigan Community Foundations' Youth Project, because you were asked to build something that had never been done before anywhere. How the heck did you do it?

(KA): It's my favorite job description, really. I wouldn't want one that had things around it. It was a big goal. Originally, I talked to Dottie, and she said, "I have a little three-year grant from the Kellogg Foundation. [Laughter] I'd like you to come and just spend three years and [00:02:00] then you'll know how foundations work and then you can go do whatever you wanted to do." My original commitment was for the three years that was really, I learned later, an experiment about whether this would work or not. Pete Ellis at the time was our program officer. The idea was that we would help to build community foundations and engage young people as grantmakers.

At the time, there were some mistakes. I think it's important to point out what went wrong with that first grant, because we haven't talked about that in other places. One of them was that we had not, in the first grant, said that the youth money had to be endowed. What happened in the first three years is some of the community foundations spent the money and we all looked at each other and said, "Oops, wait a minute. That's not what we meant." That was a little note to self, next time, make sure that we put that in the rules. It was very formative. People were frustrated because they would say to us, "Exactly what do you want from a youth [00:03:00] committee?" My answer would be very general, "It has to have diversity, it has to have kids under the age of 25, and the adults can't take the lead. Within that, we want you to form them." They all were formed very differently by smart people on the ground. At the end of the three years - and I'm thinking, Joel, by then were you the program officer?

(JO): Yes.

(KA): Yes. Pete Ellis had died suddenly, and Joel, when you came in, we had what would now be called in modern theory a "big, hairy, audacious goal," which is one of those goals that nobody thinks you can do, but it's very inspirational. The goal was to cover the state of Michigan with community foundations, to engage young people as grantmakers, and to bring all community foundations up to a minimum level of viability. Very general, very big, very ambitious. The wonderful thing was that the Kellogg Foundation and [00:04:00] you supported it. We said, "If we dream in a big way, will you support us in a big way?" When that first big grant came through, it really was permission to run and to just see what happened.



Kathryn “Kathy” Agard

It was a fabulous experience. I would say probably I was more committed to it than I ought to have been in some ways, because it became a life passion, but the community foundation people were so special and there is some magic about the \$1 million challenge. Especially 20 years ago, when I could drive into a little town in Michigan and meet with local people and say, “I have \$1 million available to you. Here’s what you need to do to get it.” You could see people’s eyes light up.

One of the things that would happen at the local level is that I could tell within 15 minutes whether it was going to be a really easy community foundation to put in place or [00:05:00] whether it was going to be a tough slog over a lot of years. It was all based on the leadership of the people in the room. If I would start to talk about, “What is a community foundation? What do you need to do to get this grant? How can we help you?” – we also had, I should mention, support from the Mott Foundation for technical assistance to be able to support the development of the foundations – I could walk out of some community meeting and I would know immediately, these people have it. They’re going to call me. I’m going to have questions, but they are going to run with this thing. Other times, I could walk away and I would think, We’ve got to keep going back because we don’t have the right people yet in the room who have the vision to be able to make this happen.

It was a wonderful opportunity and the components were the fact that with your leadership we were able to hand back to the community and say, “We have a wonderful opportunity for you, but it’s [00:06:00] your opportunity.” Then my role really became one of cheerleading and handholding and being available by phone. Many, many times people would call me and they already knew the right answer. They just needed somebody to talk to because they were the only community foundation director in their area and they didn’t know anybody else. Sometimes they would call with complicated legal questions, and then we had the real advantage of having an attorney on retainer that I could call and say, “I’m not an attorney, but let me find this out for you.” For a generalist who loves community organizing, it really was the perfect job.

(JO): Let me ask you a specific question. It makes sense that you can build local community ownership through the challenge process. That makes sense. How did you do something that was much tougher, and that was to get [00:07:00] the little communities that could not possibly support a freestanding community foundation on their own (they’re just too small) how did you get them to work with neighboring communities – often there are rivalries between them – for the common good and make a Four County Community Foundation, for example? How did you do that?

(KA): I think there are people in every community who have a bigger view than their own self-interest, and I would say that that relates a couple of ways to MCFYP – that there were people who could visualize how the world would be better. They were attracted to the big goal. They were attracted to the vision of not only what could be possible for their community, but also what could be possible for the state. Because it was such a big vision, [00:08:00] it was energizing and it allowed people to be able to get over what might be parochial.



Kathryn “Kathy” Agard

I know you've heard me say this, but I've had [Laughter] wonderful conversations, and sometimes just my own being surprised would hold a mirror to them. I met with two separate communities that were not five miles from each other, the heads of the two towns. At one community, I was talking with them and they said, “We don't trust the people in the other community,” and I would say, “Why? I just met with them. They seem to be really nice people. They're not ogres.” They said, “They stole our county courthouse.” I said, “Oh my gosh, they stole your county courthouse. When did they do that?” “1820.” [Laughter] Four generations ago, they stole the county courthouse. [Laughter] My amazement at that – I think some of it is just reflecting back to people the way that they envision their reality. Then being able to talk to them about [00:09:00], “Here you are now, but here's where you could be. You don't lose anything.” That there are ways that we can structure this so that there is no harm.

I think one of the things in all of the relationships in Michigan that has been critical has been people look out for each other to make sure that when something happens that damage isn't done. “Not only do I benefit but you benefit, so that I'm not exploiting you for my own benefit.” In the case of two small community foundations, they both win. Being able to say to them, “You don't have to give up anything by doing this with somebody else. In fact, together, you both will be able to win by restricting funds, by doing some things countywide that make sense to do together.” Then continuing to talk with the leadership people, sometimes bringing them together for a cup of coffee and being very informal about having a conversation, “You both want to do this. How can we make this work?” Then engaging them in the [00:10:00] solutions.

We had creative attorneys, and I don't mean that in any pejorative way. [Laughter] We were able to say to them, “Can we make this work this way?” The field is flexible enough that just because it hadn't been done before didn't mean that there was any reason not to do it that way. We were able to put together partnerships and umbrella organizations that had sub-funds underneath them and other ways.

Again, because of the flexibility in the grant, we were able to say to people, “Little Community A, you probably can raise enough money to get \$500,000.00 from Kellogg, but Medium-Sized Community B, you might be able to raise the two so you could get \$1 million. If we put you under one umbrella, Kellogg will approve \$1.5 million.” The fact that you all were willing to say, “Let's not punish the little community by coming together with a larger community,” made a huge difference. It gave us the opportunity to build win-win scenarios [00:11:00].

(JO): Let's talk for a minute now about the youth component of MCFYP. Today, with 86 Youth Advisory Councils up and running and doing a great job, it's not at all controversial or unusual. When you were starting to see these YACs, as they're called, there was a lot of pushback and a lot of doubt with whether it could succeed. How did you help those adults to see that youth could be great grantmakers?



Kathryn “Kathy” Agard

(KA): I would say that some of them reacted with horror [Laughter] at the idea that we were going to actually give young people \$1 million. Again, that’s a place where that amount of money just terrified people, that young people would have that much money under their control. Some of it was cajoling, just simply saying to them, “If you want the \$1 [00:12:00] million, this is what you have to do.” Some took to it right away, and then some, I would say, were very resistant and we had to work very hard to get them to go through the behaviors. I suppose maybe it’s part of that psychology of if you can get somebody to behave a certain way, eventually it becomes a part of their psychological make-up. We were really saying to people, “Do this. Here’s the way you need to do it.” Then as they gained experience with the young people, the young people themselves sold the boards about how responsible they could be.

We had tons of problems. I wouldn’t want anyone to think that it was not fraught with problems. We had adults who couldn’t figure out how to let go. We had community foundations where they would want to have the exact rule. They wanted 50% adults, 50% kids, and then the adults wanted to run the meeting, do all the work. [00:13:00] Often, interestingly, they would select classroom teachers to be the advisors to the Youth Committee, and what I realized over time was that teachers are used to keeping kids under control. That’s the very first thing they have to do, and they’re used to giving information. After a while, we learned that we probably needed to back off and either look for a different kind of teacher that (I don’t want to judge all teachers) or that we needed someone more like a coach who was used to backing away and letting the kids make mistakes. We learned a lot about how to do that.

At Kellogg’s request, insistence, we wanted to make sure that the youth committees were diverse, and diverse even in the sense that not only the valedictorians. Again, because the adult board was nervous, they wanted to make sure that all the kids that we had were “all-A” kids who were highly motivated, highly structured, were going to be successful [00:14:00] anyway no matter what happened to them, and involve some of the kids who were natural leaders who may not be on that same path. That was probably the most eye-opening thing, I think, as the foundations did it in many cases because they had to. Once they did it, they began to embrace it. We also did a lot of training for the young people, and we did a lot of training for the adult advisors, and we were on the phone a lot with the adult advisors.

In the end, just to complete the thought, I would say the majority of the community foundations now have young people on their adult board. They’re not only giving advice on the interest from \$1 million, they’re advising on all of the grantmaking. It was an enormous and surprising success. It was good.

(JO): In MCFYP, for a program that was supposed to build community foundations and get [00:15:00] full coverage and also to get youth involved in philanthropy, there were some surprising twists and turns, like the FIMS [Foundation Information Management Systems] computer project



Kathryn “Kathy” Agard

and the positioning project, which was essentially marketing and branding of community foundations. What led you into those interesting byways?

(KA): I think of those projects as stepping from one ice floe to another [Laughter] – they sort of came. The community foundations discovered, I think, through the Exxon Energy Initiative and through MCFYP that they were stronger working together than working separately. They could get more money, that they could share expertise, that they liked each other, they liked to get together. There was a camaraderie among the community foundations. I suppose one success begot the next problem, if you will. The growth of [00:16:00] the community foundations with additional assets and money to manage meant that they were having problems with their accounting. A few of the big foundations said, “We’re going to go after our own accounting systems.” We said, “Instead of getting your own, how about if the whole field does it?” They were able to work that through so that everybody moved together. We actually worked with a tiny, tiny firm, it was two guys who had a dream, and turned it into what is now a national accounting and software program system, but that was because we wanted to have a lot of input in the design and development. That just morphed, if you will.

I remember walking into the office of the Kellogg Foundation – it’s one of my favorite moments because we had prepped and we were ready and as I walked in – Dottie and I always went together. Dottie is tall and I’m not, so we always looked like [Laughter] Mutt and Jeff walking in. We walked into Joel and [00:17:00] Russ’ office, and I could tell by looking at Russ’ face, or maybe your face, that we were not going to get funded. We had really worked on this, but it wasn’t going to happen, and Dottie had warned me that this was not something that Kellogg normally funded and we probably weren’t going to get it. We did our best case. We had our suits on and we were just, like, here’s the reasons, one, two, three, four, five. About halfway through the meeting, I think you were saying, “Thank you very much. We’ll take this under consideration. We’re really happy to have you.” I think we might have even stood up and we thought it was at the end, and Russ said, “Let’s sit a minute. Tell me a little bit more about what this...” [Laughter] and I could see the look on your face of, whoa! This is going in a different direction than I thought it was going to go. It was a different direction than we thought it was going to go, too. It ended up being fabulous because you were hearing what we had to say. It ended up being a way to begin to organize the [00:18:00] community foundation field into some common systems that they didn’t have before. Using the software as the driving factor to bring them together was a part of the reason.

Jack Hopkins had the idea of having a tax credit for community foundations. It happened at the same time as the MCFYP challenge and so suddenly, we had multiple leverage points where we could say to government, “If you give us \$1.00 through the tax credit, Kellogg will give us \$1.00, and the community will give us \$2.00.” We could say to the community person, “If you give us \$2.00, you’ll get the tax credit from the government, and Kellogg will match it with \$1.00.” We were able to say to Kellogg, “If you give us \$1.00, the community will match it with \$2.00, [Laughter] and the government will match it with \$1.00.” Out of this leveraging, everybody won,



Kathryn “Kathy” Agard

everybody felt really good about it, and communities were able to be built. The timing of the tax credit couldn't have been better [00:19:00], both with the economy in Michigan, the leadership in Michigan, and having the Kellogg challenge, again, probably as a leverage point because as we went in for the lobbying for the tax credit we were able to say, "Here's money that will come from Kellogg as a result to your local community. It's going to be an easier way to raise it." For the small communities, the community foundation encouraging smaller donors was really important. I'm sad that it's gone. It's too bad that it had to end. I know Karen Tice, who's done a lot of evaluation of MCFYP, really was kept busy for her whole career evaluating all of the spinoffs that happened as a result of that one big effort.

(JO): Just a word about Bob Tobin and the branding project.

(KA): The branding project, that actually happened just as I was leaving. I left the project partly because I was tired of being gone every weekend and evenings [00:20:00] planning retreats for community foundations. The community foundations wanted to have some sense of common identity. No one knew what a community foundation was. I always had to start with what is a community foundation? How do they function? Because no one had ever heard of them. They had intentionally, I think, been somewhat low-key. They're more like bankers than flashy folks – old-fashioned bankers. [Laughter] They went to Bob Tobin and the Williams Group here and talked to Bob about, "How do we capture the essence of what is a community foundation?" They went round and round and round.

This was a case where I was a part of this conversation. We initially went to the Council on Foundations. The typical pattern was that we would see a need, we would go to the Council on Foundations and say, "Here's a need in the field that we're seeing in Michigan." They would say, "Eh, we're not interested. Not ours to do." [Laughter] We would come back and say, "Nobody else [00:21:00] is going to do this. If we want it done, we're going to have to do it ourselves." Then after it's done in Michigan, then it goes back and becomes a national project.

The branding project certainly was one of those. We went and we said, "The field needs to have a common branding." They said, "Eh, we don't think we could." In fact, they might have failed at a couple of early efforts at it. Then the Michigan folks came back and they got together in a group, and they worked with Bob, and they worked on projects and eventually they came up with the phrase, "For good. For ever." which is perfect, it really captures the essence of the community foundation. It required the community foundations, some of them, to change their names because they were just the Kalamazoo Foundation or the Fremont Foundation, and they had to change their names to the Kalamazoo Community Foundation or the Fremont Community Foundation.

The other thing that it did, and was a result of the tax credit, but is related, was that once we passed the tax credit [00:22:00] – we needed a clearer definition, a legal definition, a legal



Kathryn “Kathy” Agard

description – about what a community foundation was, because every little organization in Michigan [Laughter] was renaming itself a community foundation so that they could be eligible for the tax credit. That took probably a year and a half of very hard hammering out among the community foundations, again in Michigan, about exactly, legally, what does it mean to be a community foundation. Lots of reading of the IRS tax code and going back into the '69 Tax Act and a lot of tough research, but that definition then became the base of what is now the national definition and the start of standards for community foundations. All of those were spin offs.

(JO): Let's change gears a little bit now and talk about another thing that you did that no one thought could be done because no one had ever done it before. When Cal Patterson of [00:23:00] the McGregor Fund came to the Council of Michigan Foundations and said, "They're starting all of these programs around the country including at Grand Valley and teach philanthropy to kids in college, what about kindergarten through 12th grade students? How would they learn about philanthropy?" That caused a lot of people to scratch their heads and say, "Don't know." You then were given the task of building a kindergarten through 12th grade platform for teaching philanthropy to kids as young as five. Again, it never had been done. There is no manual on how to do it. How did you approach this rather interesting task?

(KA): I would say the one thing that (it's probably hubris on my part) is that I always think that if I don't know something I can learn it. Learning to Give would be [00:24:00] really – I only know enough about education because I went through school. I don't know very much about the formal structure of K-12 education, and yet I have real passion for this. This was a place that I thought if we're ever going to make a difference in the world long-term, it's going to be to make sure that the next generation really understands and has the experience that neither you nor I ever had the luxury of having. There just weren't these programs when we were kids, or even in college or graduate school.

Dottie had put together an advisory committee to first talk about *does this make sense?* Of key funders, of people like state school board members, of Jim Kelly who had put together the National Board for Professional Teaching Standards, other people who were a cross mix of foundation people and education people. That committee stayed in place. I was a part of the committee and then I wrote [00:25:00] the grant to the Kellogg Foundation for Learning to Give. At the time it was called a very jazzy title, "The K-12 Education and Philanthropy Project," [Laughter] which nobody could pronounce, no one could remember, but it was descriptive of what we were doing.

The first thing that we did was at the advisory committee, in talking with the head of the social studies for the state of Michigan and classroom teachers. They said it can't be done. They said everybody in the world wants to put their curriculum into the K-12 curriculum; that the teachers put up a wall the minute they hear that here's one more thing that they're going to be asked to do with no money and with no benefit. Even if they believed in it, they're just overwhelmed with



Kathryn “Kathy” Agard

testing. Standardized testing was coming in at that time, and they were overwhelmed by the move to having to standardize their curriculum. The best phrase [00:26:00] from Jim Kelly: “You’re being asked to do something that the education system is set up to resist. Just know going in [Laughter] that they are not going to want to do this.”

We made the decision that we would go in at the grassroots. Most people develop these projects for schools by going from the school board down and by asking university professors to write curriculum for the kindergarten teacher. We threw that out and said, “What we’re going to do is we’re going to make this owned by classroom teachers. It’s going to be grassroots, it’s going to be teacher-focused, and we’re going to honor teachers as professionals, and we’re going to treat them for what they know.” We recruited teachers, and frankly, we used a carrot of being able to give them a computer because we wanted it to be a virtual system in order to be able to cover the UP, Northern Michigan, Southern Michigan, urban schools, private schools, suburban schools, and religious schools and make sure that [00:27:00] we had all of the different types of K-12 education in that first pool of teachers.

Then I hired as an assistant, a long-time highly respected classroom teacher (social studies teacher) out of Detroit, and he became the coach on how to look at this from the classroom teacher point of view. We began to meet with them. When we met with them, we said, “Here’s what we want to do. We want to teach philanthropy,” Then we spent about a week talking with them about the fact that it’s not just having rich people give money to poor people, that we wanted to redefine it. We sent out a survey to the top thinkers in the field, about 35 people who have really thought deeply, and we asked them, “What should a graduating high school student know about philanthropy? What should they be able to do? What should be their attitudes?” We got those surveys [00:28:00] in. We re-sent out the answers to everybody. They answered again. Eventually, from that research process, we came up with some major ideas that needed to be transmitted to the next generation.

We took those general ideas to the teachers and we said, “Here are the ideas we want to be taught, but you all know how to teach it. Would you help us turn these into standards and benchmarks that work for you?” I think the key to Learning to Give was we said, “It cannot be additional work. We have to integrate this curriculum in a way that you can teach what you are already being expected to teach, but just from this lens of philanthropy and giving.” I would say one of the examples I’ve always used is every fourth grade teacher in Michigan teaches about the Underground Railroad. It’s a part of American history. It’s always taught. No one, except Learning to Give teachers, talks about the fact that they were all volunteers [00:29:00], the conductors and the abolitionists, and how people organize themselves to stand up to an unjust law – there is this richness in your normal curriculum that you can get at by teaching it through this philanthropic lens.



Kathryn “Kathy” Agard

We had the luxury because of Kellogg funding to do a lot of things that I think of as being right. We had a fairness review committee. We were able to field test lessons before they went into the classroom. Then, of course, the wonderful piece for me is that we were able to demonstrate philanthropy because we said to the teachers, “If you will write the lesson plans for free, we will put them on the website with your name and that will be your contribution to philanthropy. With that, we promise that these written materials will be available for free, forever, for all teachers.” It still is available. It’s still free. They’re getting about two million hits from teachers and [00:30:00] downloads a year.

We asked the graduate students at the new centers on philanthropy to write briefing papers that are like cliff notes, because we knew that teachers weren’t going to know anything about this content. It would be unfair to ask them to teach something that they were not familiar with, so they could have a little briefing paper on people, ideas, or organizations, and that would give them some background material. Then we did a lot of seminars and workshops and those kinds of things. It’s a fun project that’s still going on.

(JO): The key to getting teachers to accept it was that: A) these lessons were written by teachers, not by outside professionals; and B) they were on things that the teachers had to teach anyway – on subjects that, because of the standards and the benchmarks, they had to teach them anyway.

(KA): Suddenly, we flipped from being [00:31:00] an add-on to being a help because they had to teach to the standards. A lot of times, for example, a new teacher might get on a Monday a report from their principal that all their kids didn’t do well on this part of the social studies test. They could go in and look at that benchmark and all of a sudden, there would be 10 good lessons written by outstanding teachers that would help them teach the academic benchmark, but through this lens of philanthropy.

I would say the other thing that made it work was that it was led by teachers inside the school. What we would say to the principals is, “We would love it if you just wouldn’t get in the way. [Laughter] Just don’t say no. See what your teachers will do.” The teachers would convince each other. The students would be talking about it. It really bubbled up rather than coming from their school board saying, “You must do [00:32:00] it. You must do this and do this this way.” That happens to teachers almost once a month.

(JO): I think most people would say, “I get how you teach philanthropy to someone in high school, about writing a check and so forth, but how do you teach philanthropy to someone in kindergarten who doesn’t really even know what money is yet?”

(KA): They’re my favorites, actually. [Laughter] Someone had said to the group of teachers, “You can’t have them use a word like ‘philanthropy.’ We need to find a simpler word.” [Laughter] The



Kathryn “Kathy” Agard

kindergarten teacher turned around and she said, “They can say Tyrannosaurus Rex.” [Laughter] It’s just a matter of them getting the picture in their mind. With the little people, everybody has something that they value. For adults, often it’s money that they value, but for little kids, [00:33:00] it could be a toy. It could be their time. Most children are naturally compassionate, particularly about animals. A lot of times, working with children about doing something that’s a benefit to animals, asking them to donate their toys that they don’t play with very often, I would say to the teachers about the lesson plans, “You, at that point, don’t want to talk with little children about sacrificial giving. You don’t want them to give their favorite bunny, but to give some of the things that they have to children who have less.” It’s amazing how generous children are, and that having words to be able to talk about that really helps them figure it out. You can see their brains working, that they’re figuring it out.

The little people are really great at it, at understanding the meaning of doing service. They love to be asked to do service. [00:34:00] Unfortunately, in our schools we too often have the kids raising money that benefits them. It’s a cookie sale so that their hockey team can go someplace or their choir can get new robes or those kinds of things. I think it’s a very new idea for kids to raise money or to do service that benefits somebody else. There is something very authentic about what we all get from giving. It’s a support for the fact, I’m a good person. In our culture, we often tell kids, “You’re wonderful, you’re wonderful, you’re wonderful,” but they don’t feel like they have earned it and so they don’t internalize it. The one nice thing about Learning to Give it is that they both have a language and experience that it doesn’t matter if somebody tells them they are a good person, because the act itself reinforces a [00:35:00] very authentic way of building confidence and a good character, I think.

(JO): One thing I think a lot of people would wonder about Learning to Give is that it’s not only challenging enough that you had to go from kindergarten through high school and talk about 13 different grade levels of work and making things relevant for each of them, but you’re also talking about standards for the state of Michigan, for the state of California, for the state of Maine, for Hawaii. How did you manage to knit the whole nation together in the Learning to Give program?

(KA): That’s a good question. A lot of people don’t realize that until really that period, not only were there multiple state standards, every school system set their own standards. [00:36:00] Depending on where you went to school was what you learned. There was no common core curriculum. From that survey that I mentioned, we developed standards for philanthropy education. There are standards and measurable benchmarks for what a student should learn at 5th grade, at 9th grade, and at 11th grade.

They should be able to define philanthropy at kindergarten as “The giving of time, talent, and treasure for the common good.” Then by ninth grade, they should be able to define it as “Intended for the common good.” There’s the idea of intentionality and sometimes things go wrong but you meant for it to be good. Then when you get to high school, it really is about the deeper



Kathryn “Kathy” Agard

philosophical pieces of it. I've forgotten exactly how the benchmark is built. We began with Michigan standards because we frankly thought it was going to be a Michigan program. We had [00:37:00] started out looking for a national program to bring to Michigan, and it was when we didn't find one that we decided to do Learning to Give, and we hadn't originally thought that it could go nationwide.

We started by hand-coding it. As in teachers sitting in rooms, looking at a lesson plan and by hand – actually typing it in, but this fits this code and this code and this code. As the benchmarking system and standardized testing went across the country, probably five years into Learning to Give, we were getting more and more national attention. There became a software company that actually converts the lesson plans, so we were able to put a lesson plan in and standardize it to Michigan, and then convert it to all of the other state standards. Now what can happen is a teacher from anywhere can go in, type in the state they're in, and it will give them the converted version of it. There are 50 versions of 2,000 lesson plans that any teacher can download. [00:38:00] They're downloadable so that – the other thing we knew was that no teacher ever teaches the lesson plan the way that it's written. [Laughter] They all teach it on the fly because teaching is an interactive process. The lesson plans can be downloaded so that the teachers can just change them in their computers. Nobody cares about ownership.

I would say that is one of the things [on the side] that I have valued so much about the whole field of philanthropy is that it has really been about giving. In community foundations and in Learning to Give, nobody has cared about copyright. Nobody has cared about ownership of material. Everybody has freely thrown their potato in the stew pot, [Laughter] and I've got meat, and we'll see what we get. I really value that piece of it. One of my friends long ago said, “I know that I have succeeded in my career when I read my own writing coming back in somebody [00:39:00] else's brochure.” [Laughter] The field has always had that kind of giving in it.

(JO): Before we move on, you've talked about two very interesting, very novel programs that you built from the ground up. I'm wondering if there are any common lessons that come out of them, or maybe you learned two completely different lessons – one in one and one in the other – that you'd like to share with practitioners who might be trying the same thing.

(KA): I think there are commonalities. One is the process, from the conception of the idea through the grant, were fairly common processes. I think that was first, somebody had an idea, and then all of the potential [00:40:00] stakeholders were brought around the table, and I'm sure some private conversations with funders who might be interested, but just saying, “Come to the table. Let's see if this idea has any validity or not.”

Learning to Give is a good example. I think that idea cooked for several rounds before it finally got legs underneath it. The timing wasn't quite right, or people weren't sure it could happen. Cal had worked on that for a while, I think, before it actually moved forward. Then it would be having



Kathryn “Kathy” Agard

enough of the ideas gel to be able to form a general framework of, again –big, hairy goals – that were here’s what we want it to look like 10 years from now. But not prescriptive about how we’re going to get from here to there. Let’s put out what we want it to look like and then see what happens. The grant written – and this is where Kellogg had brilliant funders, and you, Joel, were a great program officer for it – [00:41:00] we were able to work and say, “Let’s have the faith that the work will be done, that honest work will be done. There will be failure (I know you covered for me several times [Laughter] when there was failure). That we would learn and grow and that people would be working hard.” There was a tolerance for failure in the process, then engaging the people who actually were doing the work in the process of creation and in making it their own. It’s really important that it not be top down. It’s messier, it’s longer, it’s more frustrating.

In both cases, there was a huge educational component. In one case, educating community members about what is a community foundation; in another case, educating teachers about what is philanthropy and philanthropy education. It means a lot that people have the background to make [00:42:00] decisions. Given the background, they typically will take the big ideas and run with it. I can’t also discount the importance of the fact that there was money, that we were not starved to death like some good ideas are. We always knew that it’s not like they were rich projects, but there was enough that I wasn’t always having to go out and meet with donors and spend half of my time raising money at the same time as I was trying to do the work. I always had the faith (and you all gave us the faith) that if we did good work and if we could come back and show that we had done the work and had achieved the objectives, that you were still on the same team with us and that we wouldn’t be making cookies for bake sales in order to be able to write the next lesson plan. It made a huge difference.

(JO): That leads us, then, to the next stop of your career train [00:43:00]. You had spent a lot of time writing K-12 lesson plans and then you graduated, as Dottie would say, [Laughter] into the Johnson Center for Philanthropy. A very different gig, because unlike MCFYP and Learning to Give which were handed to you in concept and you said, “I can build this,” the Johnson Center was up and running, had been for 14 years, had three predecessors as executive directors and, of course, a university in the middle of it all. If you could tell us a little bit about some of the challenges and some of the joys you experienced at the Johnson Center, it would be great.

(KA): Learning to Give had made the decision that we were becoming international quickly. I knew that in order to be able for it to grow, I had to let it go, because I [00:44:00] wasn’t at a point in my life where I wanted to do national travel and all of those things. I had looked at the Johnson Center job several times before when it was open and I was always in the middle of a big project and never could have put my hat in the ring. This time, it happened to coincide with what was happening with Learning to Give. I had wished all my life that there had been something like the Johnson Center when I was a freshman in college, because all the way along I had pieced together the information that I knew I wanted to learn and it never was in one place. In some cases, it hadn’t been created yet because the field was so new. The idea of the Johnson Center is



Kathryn “Kathy” Agard

very attractive. Your being here at The Grantmaking School, I really respected the people who were at the Johnson Center and who had the vision for it being national.

Being an entrepreneurial person inside the big [00:45:00] institution is a challenge. I knew this about myself coming in – that it was going to be a challenge because when people tell me, “No, you can't get that pencil right now because we can't afford it.” Someone says “No” to me, I'm usually asking, “What are the five ways we can get around the no and still be legal?” [Laughter] This is not a good trait to have in a university. I would say it was challenging in the fact that I always felt like I was pushing against what was generally a very supportive system. I think Grand Valley is very entrepreneurial. It just is a big system, and it's a big system that is designed for the purpose of educating undergraduate students, not for the purpose of supporting Kathy Agard's dreams for the Johnson Center to take over the world with philanthropy education. I would have to remind myself that we were not the essence of Grand Valley. We were fortunate to have this big institution as support. The [00:46:00] joyous part of it has been that we've had great, great deans who have been responsible for the Center, who really buffered that institutional presence and let us go so that it was possible to do some creative things.

Certainly, the Johnson Center building, being able to move – we were deep inside the university structure, and so it was hard for people from the outside to feel very welcome. I think that you coined the term [Laughter] – we were like a Motel 6 because all of the offices were in a row down the line and everybody had their doors closed so no one would talk to each other. Grand Valley let us design the space for the Johnson Center so that it was very open, somewhat off-campus so that we could become a real community place and a boundary-spanning organization for the university. We were taking university intellectual resources to be able to be helpful to the worker foundations [00:47:00] and nonprofits in the community, and the community people would feel more welcome to come in.

I think, in terms of general contributions during those five years, that would be one of the things that I am happy about. During the whole five years, we struggled for money, and partly that was a result of changes at the Kellogg Foundation and their programming focus and how they managed that transition because it was very up and down. Were we going to be funded? Were we not going to be funded? It became very challenging to take on a project. In many ways, a center that has the kind of research base that the Johnson Center has, it's like being in an emergency room in that you have to have the emergency room open all the time even though there may only be a major accident once every five years. You can't at the five-year mark, when somebody's in your [00:48:00] parking lot, say, “Oh my gosh, we've got to hire some surgeons and some anesthesiologists.” There's an ongoing expense to keep the research capacity open even though there's not – it's like a consulting business. How do you keep the capacity there when you don't have a steady stream of dollars coming in necessarily? It's very up-and-down. That was a challenging piece of wanting to have the Center recognized as Michigan's center on philanthropy,



Kathryn “Kathy” Agard

and to be owned by the field as their center on philanthropy, and yet not being sure that the foundation world, in particular, was ready to invest in it the way that it ought to be invested in.

(JO): It's a constant pull. We're going to be talking here about what we've learned that could be of value to practitioners in other [00:49:00] states. I'm particularly interested because you've been on the frontlines with this, about the roles that human talent and financial resources and knowledge have played in advancing philanthropy in Michigan. Every state has those to one degree or another. How would you triangulate those - human talent, financial resources, knowledge?

(KA): I think they're all important. I think there's a lot of human talent in the world. I think it's a matter of letting people use their talents and recognizing what they are rather than feeling like there's a paucity of it. There really is a lot. In Michigan, I do think we have all benefited from these extraordinary leaders and they have been extraordinary leaders in so many ways, but one of them is that they [00:50:00] have nurtured talent and they have a lot of people to take responsibility. A piece that I have appreciated so much was that, for example, the program officers from Kellogg would sit with us. I never felt like you were sitting in judgment of us, but that you were partners. And that we had work to do, and our job was to get out there and be out there in the middle of the night getting the snow off the windshield [Laughter] in the Upper Peninsula and that the foundation's job was to be there cheering us on, and also calling us up short if something was going wrong, but that it was a partnership and not a power relationship. I think that part came out in the human talent.

The program officers have enormous human talent and connections to the best thinking in the world. To have them at the table (this goes into the knowledge piece) but both the talent and the knowledge to say, "We're your partners and we're willing to [00:51:00] share what we know." Altogether, I'm always a Quaker admirer, and I always think that each of us hold a piece of the truth. If everybody brings it together, you get a much richer understanding of what's going on both in terms of talent and in terms of knowledge that was brought to the table in many ways on these projects.

Money is certainly important, but I have (and maybe I've been spoiled by Michigan) but I do really believe that money follows good ideas and energy and that if you care about it - I suppose I learned this from Dottie, I think I even remember - I can hear her voice [Laughter] in the back of my head right now saying that, "She who cares enough about it and is willing to go the extra mile, that money will follow because people want to be engaged in success and in projects and things that are interesting and things that make a difference, and that money will follow that good work." I've just believed that my whole life.

(JO): [00:52:00] If you were to extract the key lessons from the Michigan experience that might help other states build strong infrastructure, strong supportive institutions for philanthropy, what would those key lessons be?



Kathryn “Kathy” Agard

(KA): You need to commit to do it, that you think infrastructure is important. You need to be thoughtful that you have everyone who needs be there there, and to fault on the side of inclusion rather than exclusion. If you have a question about whether a foundation should be invited in or not, invite them in. If you have a question about should the teachers become involved, involve them. Fault on the side of being inclusive.

It does make a difference to have a big goal. I think setting a big, clear goal, (not [00:53:00] down to the minuteness of it) just a goal like we’re going to have the strongest association of nonprofits in the country, and we’ll know we do when we can influence tax policy for the benefit of people in our community. Big goals.

One of the things we benefit by in Michigan is that people naturally have developed relationships, but I also think that they have an understanding that they need to nurture their relationships. People get in the car and they actually drive to the Upper Peninsula. They drive over to Detroit, or from Detroit they drive over to Muskegon. Michigan is a big state, and still people get together. They take the time to get together. They talk with one another. They josh one another. They go to dinner. I think all of those kinds of things help it when things go wrong, so then when the natural tension happens that will happen as you’re trying to do something new, you have [00:54:00] trust in the other people that it just went wrong. It was just a mistake, not that there was any ulterior motive or that there was any other thing other than just life is messy and sometimes things happen, and that everybody is trying to help each other out. Being intentional about developing those relationships might seem a little odd at first, but it’s incredibly important.

(JO): What has been really difficult in the development of Michigan’s philanthropy and the nonprofit community? We’ve talked a lot about success, but what has been difficult? What has been the place where we’ve stubbed our toes?

(KA): It’s hard to think about what has been hard. Right now, in retrospect, [Laughter] it all seems very easy. I would say that there are strong, smart, educated people [00:55:00] who have been in positions of power who didn’t necessarily agree. It’s not pettiness. It’s actual disagreement – and I can think of a couple. One is the disagreement about whether strategically you allow a small community to develop its own community foundation within a big geographic area that another community foundation has already staked out as their service area.

(JO): Community Foundation for Southeast Michigan?

(KA): Southeast Michigan. Very tough issue. The Community Foundation for Southeast Michigan is seven counties. They felt very strongly that they needed to harness all of the resources of the region in order to save the largest city in Michigan and one of the largest in the country, and you have a small group of donors in a suburban community who say, “No, we don’t want to do that.”



Kathryn “Kathy” Agard

We want our own little suburban community foundation. We’re not going to send our [00:56:00] money to Detroit anyway, to the regional community foundation. We have the right to give our money anywhere we want to.” Very difficult and honest conflict. These are two very different points of view. How do you wrestle with that?

I think those kinds of issues came up. Around that tax credit there was a very difficult issue about if we’re in the business of endowment building and that’s what makes us distinctive... and we only want big gifts typically at the end of a person’s life or when they’re in a position where they can make a big endowment gift... then all of a sudden, we’re switching and saying, “We’re going to give you a tax credit for a little gift, from people who are making donations out of their checkbook.” Huge change for the field and not without people who were resisting and saying, “No, you’re stepping into the United Way’s world. You’re causing all kinds of conflict. This isn’t something we ought to be doing.”

Around the definition [00:57:00] of a community foundation, we had a huge argument at the very beginning of MCFYP because the Council on Foundations had a belief that you needed a community of 150,000 people in order to have a successful community foundation. The people who believed that were people who had community foundations in New York and Los Angeles and Chicago, [Laughter] San Francisco, and really big cities. It was hard for them to fathom that Fremont could have a \$200 million foundation or that Grand Haven could have a \$75 million foundation. We were – I would say, “blackballed” is probably not too strong a word – by the whole field because we thought it was okay. Part of the philosophy was that all philanthropy is good, and that you need to nurture it wherever it is, and that people in the local community and donors – it’s their money. They should give it where they want to. That resulted in a [00:58:00] lot of controversy about our starting a lot of community foundations in small towns. It has resulted in, I hope, disproving that concern because where they actually were too small, they have now combined into these bigger entities to get enough scale to be successful. Where there have been any problems in the community foundation world, there actually have been [problems] in the big foundations because the truth is the IRS is going to be a whole lot more concerned about something happening at the Chicago Community Trust than they are with something happening at the Alpena Community Foundation. Again, just because of the scale of small foundations.

There was a lot of controversy. I wouldn’t say that it went wrong. I would say there was controversy and we decided to ignore it and say, “We understand. We hear what you’re saying. We think you’re wrong.” And go ahead and do it anyway.

(JO): You started to sing as you tackled the thing...

(KA): [00:59:00] [Laughter] That couldn’t be done, yes.

