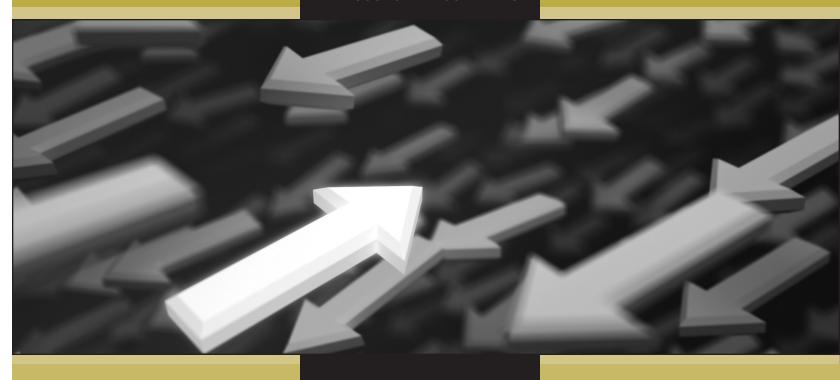
MORE THAN WORDS

A RESOURCE IN FOUR PARTS



PART ONE: ORGANIZATIONAL TRANSFORMATION



MOVING BEYOND THE STATUS QUO

A DESCRIPTION OF THE
FOUNDATION FOR THE MID SOUTH'S
ORGANIZATIONAL
TRANSFORMATION
EMPHASIZING RACIAL, SOCIAL,
AND ECONOMIC EQUITY.



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PREFACE

Beginning in 2003, the Ford Foundation made several significant investments in the Foundation for the Mid South (FMS), enabling the FMS board of directors and staff to reflect critically on how the organization needed to transform if its leadership wanted to effectively pursue its commitment to promote racial, social, and economic equity in the American Mid South. The Ford Foundation provided resources to support (1) an internal change process that engaged the entire FMS board and staff, and (2) the establishment and activities of the Mid South Commission to Build Philanthropy (the Commission).

The Foundation for the Mid South recognizes the importance of sharing the lessons we are learning from this organizational transformation process with the wider philanthropic community. In the aftermath of Hurricanes Katrina and Rita, our country has once again been challenged to recognize and acknowledge that inequality, persistent poverty, and racial disparities continue to undermine the health of our nation and deny the full dignity of all persons. While philanthropic organizations cannot resolve these challenges alone, they can use their voice, leadership role, financial resources, and credibility to make important progress on these fronts.

In addition to the report of the Commission, *Where Hope and History Rhyme: Reflections and Findings from the Mid South Commission to Build Philanthropy*, the Foundation for the Mid South agreed to prepare and disseminate four additional resources that philanthropic organizations interested in working on issues of equity could use to inform and guide their efforts. These resources and tools include the following:

- A look at FMS's transformation to support and invest in racial, social, and economic equity in the Mid South and the impact that the process is having on FMS's organizational and grantmaking strategies.
- Reflections on the leadership challenges that chief executive officers must negotiate as they work with both boards and staff throughout a transformation process.
- A description of the process that the FMS board followed in its efforts to develop a governing board prepared to lead the foundation as it works more deliberately on issues of equity.
- An assessment of how documentation can enhance the transformation process that includes the seven memoranda chronicling the work of the Mid South Commission to Build Philanthropy.

These four resources and the Commission's report are available in print or electronically at www.fndmidsouth.org. We welcome your feedback and questions, and hope that these materials prove helpful to our colleagues.

CHAPTER 1

OVERVIEW: REPORT IN A GLANCE

CHANGE IS A JOURNEY, NOT A DESTINATION

The intent of this and the three additional *More Than Words* resources is to share the learnings and experiences of the Foundation for the Mid South since our efforts began in 2003 to emphasize racial and social equity both in our own work and governance and in the Mid South region. Bluntly speaking, FMS's experiences have and continue to be challenging. But we are seasoned and dedicated travelers on this journey to understand what equity "means," how organizations that are serious about issues of equity initiate an organizational transformation process, and how to truly integrate social justice and inclusion into our institutional DNA. Our motto? "Change is a Journey, Not a Destination."

During our journey, staff and board are working together to help get "our own house in order." Without knowing what the outcomes and impact would be on the organization when we began the process, one measure of transformational success would be if FMS is considered by others in the region as an organization that is sincere about and committed to equity and inclusion. It is important to communicate that this emphasis does not stop at our four walls, but extends into our grants and our encouragement of Mid South nonprofits and foundations to effect social change in the areas they serve.

And while our transformation is still ongoing, this process has provided FMS with new resources to help us make significant changes in our organization and practices. More specifically, since 2003, FMS has (1) established a new mission statement in addition to having clarified priorities and objectives for our organization; (2) enhanced internal administrative, fiscal, and programmatic policies and procedures; (3) successfully undergone significant transitions in leadership at the chief executive officer and board levels; (4) developed new recruitment standards and processes for both board and staff positions; and (5) put new criteria and guidelines in place that ensure that our grantmaking practices are more transparent, effective, inclusive, and support the promotion of racial, social, and economic equity in the Mid South.

More Than Words is the story of FMS's experiences; however, we hope that the various approaches we are using to facilitate our institutional transformation, and the effects they are having on our organization—especially our grantmaking and governance—will show how change, or transformation, can occur in organizations that are interested in working on issues of equity.

THE REAL NITTY GRITTY ABOUT TRANSFORMATION

Below is a brief list of considerations that FMS either identified at the outset of or confronted along our journey of organizational transformation. While this list is admittedly incomplete, it offers what we believe are key questions an organization should ask before embarking on a mission to promote racial, social, and economic equity

Some Important Questions that Boards, CEOs and Staff Should Consider

- Does the board and the staff recognize, understand, and—more importantly—endorse the need to emphasize racial and social equity in their work?
- Is the staff and the board willing to participate in conversations that will require them to honestly and openly share their beliefs, values, and experiences with regard to race and equity?
- Does the board and staff truly understand that a serious commitment to organizational transformation *could* result in significant changes in personnel (both at the staff and board levels), institutional processes and priorities, and mission?
- Is the staff and board willing to maintain an ongoing commitment to institutional improvement with regard to equitable practices beyond the initial transformation process?
- Is the makeup of the staff and board racially, socially, and economically representative of the area(s) it serves?
- Has the organization's work and business practices developed credibility and trust with the people and organizations it serves and with its partners?
- Will the organization maintain its courage and commitment to racial and social equity even if it is an uncomfortable topic for its current and potential donors?
- Is the organization truly willing to engage, better understand, trust, and share power and decision-making with the community, people, and organizations it serves?
- Will the CEO be empowered to "push" the board to stay engaged in the journey to both better understand equity and incorporate its practice internally to facilitate institutional transformation that emphasizes social justice?

CHAPTER 2

WHY CONSIDER TRANSFORMATION?

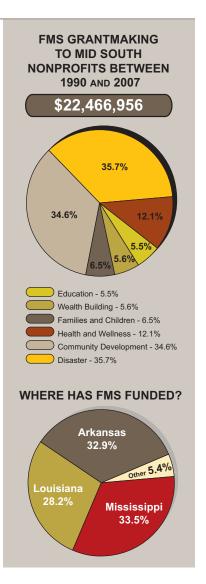
The Foundation for the Mid South works to build the communities, resources, and leadership of Arkansas, Louisiana, and Mississippi through change strategies based on regional cooperation. It does so by using private philanthropic resources to fund, develop, and promote programs in the areas of education, economic development, and families and children.

Former FMS Mission Statement

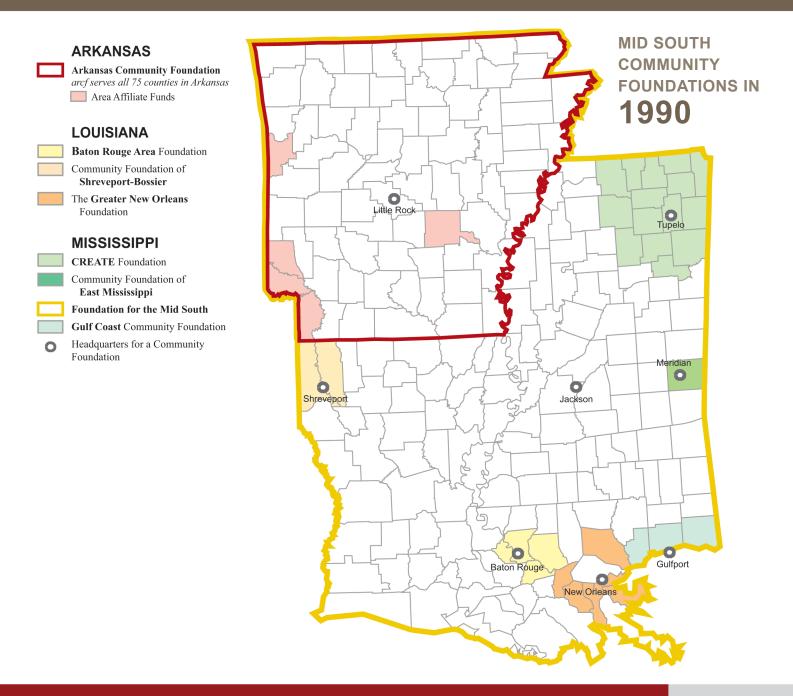
A LITTLE BACKGROUND: WHO WE WERE

The Foundation for the Mid South was established in 1990 as a resource to help build philanthropy as a powerful tool to close social disparity gaps between the Mid South states of Arkansas, Louisiana, and Mississippi—three of our country's poorest states—and the rest of our nation. When the foundation was conceptualized, we were envisioned to be a hybrid philanthropy—a regional community foundation that worked like a private foundation. The main difference was that instead of consisting of and being principally directed by donor-advised funds, we would raise private dollars to support efforts to overcome disparities and barriers to progress in the region.

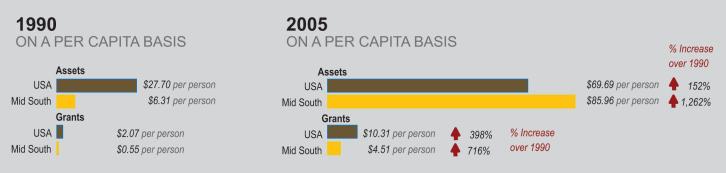
During our first fourteen years, we concentrated on three program areas: education, economic development, and families and children. We sought partnerships with foundations and corporations that understood the importance of building a vibrant nonprofit sector in the Mid South. As a result of these partnerships, we often established time-limited programs that either provided support to existing indigenous nonprofits or, if none existed, established or incubated new nonprofits to fill the void. Through our programs, we provided grants and technical assistance; initiated new, proven, and innovative models in the region; invested in leadership development; and brought people together to share ideas and knowledge.



MID SOUTH PHILANTHROPY THAT WAS THEN...

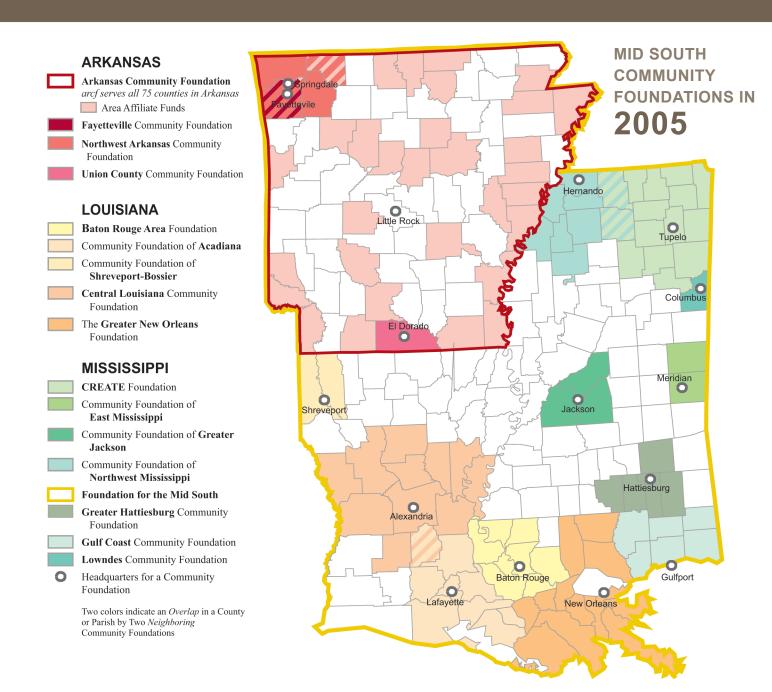


Comparison of Community Foundations in the Mid South in 1990 and 2005



Sources: Foundation Center, Guidestar

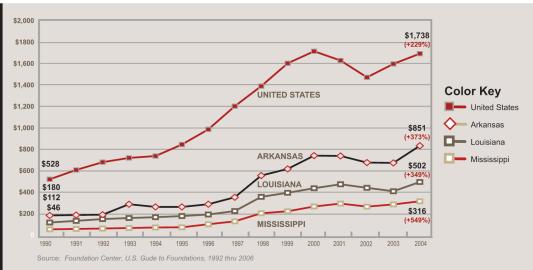
THIS IS NOW. MID SOUTH PHILANTHROPY



ALL MID SOUTH FOUNDATION ASSETS PER CAPITA

Change from 1990 to 2004

PER CAPITA IN THE
MID SOUTH INCREASED
AT OR ABOVE THE
NATIONAL AVERAGE,
BUT THE GAP CONTINUES
TO REMAIN LARGE.



THE NEED TO BUILD PHILANTHROPY TO PROMOTE EQUITY

Philanthropy in the Mid South has grown dramatically since FMS's establishment. Specifically, as the graphics demonstrate on the preceding pages, the number of community foundations nearly doubled (from eight to seventeen) between 1990 to 2005. The philanthropy renaissance experienced in the Mid South has had a particularly positive impact on growing and increasing the capacities of nonprofits serving communities throughout the region.

Every year, our region grows in philanthropic wealth; however, the Mid South continues to lag behind the rest of the nation in comparison to the number of foundations and their per capita assets. Although we have experienced substantial growth in philanthropy in the Mid South over the last twenty years, foundation assets in Arkansas, Louisiana, and Mississippi in 2004 combined to make up only 1.1% of the total assets held by foundations in the United States.² At the present rate of growth, the ability of our local philanthropy to significantly reduce or eliminate many of the overwhelming disparities that exist in the region will continue to be challenged well into the foreseeable future.

While great strides have been made, the reality is that the capacity of both Mid South philanthropy and nonprofits is quite limited. In comparison to other parts of the country, Mid South philanthropy has not yet reached the level of resources or sophistication that help shape and guide social change grantmaking in a way that creates real and sustainable change. Similarly, nonprofits in the region—while they have become extremely adept at raising money for their operations locally—generally speaking, still lack the relationships and institutional capacity to secure sustained funding from large foundations. As the region's philanthropy and nonprofits mature, it is crucial that they do so with a firm understanding of the important role that they play in creating communities that work for all people. Essentially, the decisions and actions of philanthropy can either be a spark that ignites the fire for change to move the region forward for the good of all people or a mechanism that simply helps to maintain the present conditions and systems that perpetuate widespread disparities throughout the region.

THE NEED TO BUILD RESOURCES TO SUPPORT SOCIAL CHANGE

Like our nonprofit partners, much of FMS's initial funding came from donors, corporations, and foundations within the region. Despite our success early on, the limited number of businesses and donors in the region who were able and willing to make large, sustained investments for social reform made it difficult to raise money to support a long-term, regional social change effort. Many corporations and donors in the region wanted to support their local communities, but usually did so through very public, traditional, and "safe" efforts.

The lack of significant local resources to address race and equity has made it difficult for FMS and others who wish to tackle these issues in the Mid South. As a result, FMS began receiving the majority of its contributions—approximately sixty percent—from foundations outside of the region. While these donations and our partnerships with national foundations have yielded many positive advances in the region—specifically in the areas of workforce development, asset building for low-income families, and middle-grades education reform, FMS has been relegated to the role of intermediary or program manager for this work. Ultimately, FMS's capacity to grow our endowment or to help others in the region to acquire significant philanthropic dollars to specifically address the issues of racial, social, and economic equity has been limited.

THE NEED TO SEE ACTION AND RESULTS

Despite some improvement in the social and economic conditions in the region, it was clear to FMS and a few of its long-time partners that the Mid South was not progressing at the rate or with the enthusiasm that was initially expected when we were established. This realization prompted FMS to question our ability and that of philanthropy to be a catalyst for social change in the region. What was needed to spark a widespread desire for change in the region? Who would lead the charge and advocate for this change? With limited financial resources available in the region, how could this change occur?

Of course, the answers to these questions were not immediately forthcoming, but FMS took a first step by looking inward to assess both our institutional capacity and our track record in the region. If we did not seek to improve and make the necessary institutional changes to do so, we would at best perpetuate the status quo, or at worst lose the confidence and support of those who believed that FMS could be a catalyst to improve social and economic conditions in the Mid South. Regardless of the many uncertainties and unknowns, the need to embrace change was inevitable.

In 2002, FMS leadership and the Ford Foundation began a dialogue about the challenges and opportunities that exist in the region for creating the conditions for social change. The conversations also focused on whether or not FMS was the right choice or had the potential to become a leader in the Mid South to call for and to help facilitate this change.

"At points along its journey, I had opportunities to learn alongside the staff and board, and I saw, firsthand, the progress FMS made and the challenges that confronted them. I respected the courage that the board and staff showed when they said, 'We want to create the conditions for social change in the Mid South, but we need help to be successful.' Ultimately, I believe their willingness to tackle tough issues like race and equity drew me to this organization. And while our organizational transformation is still ongoing, I believe that FMS is a better foundation because of its experiences during the process."

Ivye L. Allen, President, Foundation for the Mid South

"When we began our learning journey, I did not understand why FMS needed to undergo a transformation process. Now that the process is well underway, it is amazing how much our foundation has evolved—especially in the depth of the dialogue we are able to have about race and equity now. Looking back, we *thought* that FMS was ahead of the curve with regard to social justice and equity. What we learned is that we are really just beginning to scratch the surface."

Chris Crothers, Communications Director, Foundation for the Mid South

"FMS has a long history of grantmaking in the Mid South to help grow and build the capacity of small, community-based organizations. My experiences as a commissioner helped to guide the grant processes that we have put in place at FMS. Now more than ever, FMS's investments in the region are having a greater impact for the long term, not just through the life cycle of a single grant."

Denise (Niecy) Ellis, Fiscal and Grants Manager, Foundation for the Mid South commissioner, Mid South Commission to Build Philanthropy

CHAPTER 3

BEGINNING THE ORGANIZATIONAL TRANSFORMATION PROCESS

THE BUILDING PHILANTHROPY PROJECT

In 2003, FMS initiated the Building Philanthropy project with support from the Ford Foundation to better understand philanthropy in the Mid South and how it could be a powerful tool to build, strengthen, and transform communities and leadership. One goal of the project was to develop ideas and suggestions about how Mid South philanthropy could more effectively use its resources to address the root disparities that prevent all people in the region from participating in and benefiting from the social, economic, cultural, and political offerings of the region. The outcome hoped for would be that Mid South philanthropy would increase its commitment to and promote racial, social, and economic equity.

To help initiate the journey to understand equity and to develop thoughtful and useful recommendations, FMS formed and participated in the Mid South Commission to Build Philanthropy and documented its experiences and learnings over 18 months. A key learning for the Commission occurred during its visit to Brazil to study philanthropy and corporate social







FMS staff and board joined sixteen commissioners from the region to study philanthropy and understand how it could promote racial, social, and economic equity in the Mid South. Commissioners visited and learned from nonprofits that are successfully tapping and using nontraditional resources. methods, and leaders to better their communities.

"PUTTING A FACE" ON EQUITY

While our individual visions of what equity would look like varied, common points emerged that focused on eliminating poverty and creating the conditions for all people to participate fully in the economic, social, cultural, and political life of the region.

> Where Hope and History Rhyme: Reflections and Findings from the Mid South Commission to Build Philanthropy

responsibility. A discussion with Rebecca Raposo, CEO of GIFE, delved into the concept of shifting the notion of giving from simply providing money as charity to supporting substantive, long-term change through more deliberate, strategic, and focused use of resources to improve social conditions. The Commission also studied how communities in Brazil and South Africa, with similar social and economic issues to the Mid South, used and leveraged their local resources more effectively to create the conditions for social change.

For information on the Mid South Commission to Build Philanthropy and to read its recommendations to the region's leadership, please refer to Where Hope and History Rhyme: Reflections and Findings from the Mid South Commission to Build Philanthropy. Also, for greater detail on the progression of the Commission's growth and work, review the seven memoranda included as appendixes in "Part Four: Importance of Documentation / Documentation Matters" included in the four-part series More Than Words. All publications are available for download online at fndmidsouth.org.3

Another significant goal of the project was to prepare FMS to become more engaged in issues of racial equity and social justice in the region. On a parallel track to the Commission's work, FMS set the stage to begin an organizational transformation process that would actuate changes in our values, policies, and mission. If we were successful in our transformation, FMS would become better equipped as a resource in the region to push for social change.

An important outcome from FMS's experiences in the project was that we started to recognize that philanthropy occurred in the Mid South in many diverse, creative, and unacknowledged ways. Since the betterment of our region largely depends on the widespread participation of our citizenry in developing their own communities, we recognized the need to rethink the definition of "philanthropist." By expanding our traditional view of philanthropy to include those who possess "assets" other than money and power such as youth, leadership, ideas, knowledge, and experience, we realized that philanthropists are around us every day and need to become collectively engaged in the development of their communities to a greater degree. Through this new perspective, we saw that philanthropy—because of the resources it controls, its neutrality, and mission to strengthen the common good—was in a unique position to leverage its own assets with these emerging,

nontraditional resources to promote equity, build community assets, and encourage widespread civic participation.

Moreover, the project helped FMS leadership acknowledge that if we wished to help build philanthropy in our region to reduce or eliminate the inequities that existed here, our organization should correct the way we work. This acceptance helped FMS to see that we had moved away from our original plan to "lift up" the larger, more difficult, regional issues that require special attention and solutions. Our organization had evolved into a collection of separate initiatives that, while they conducted commendable and important work and were still aligned with our mission, did not provide FMS the opportunity to view issues from a 1,000-foot perspective and formulate strategies and partnerships to attack the root causes of the region's problems.

SEEKING COUNSEL AND SUPPORT

Prior to publishing the Commission's report, FMS conducted a series of community conversations to share the recommendations with leaders in philanthropy across the region and to solicit their feedback before finalizing the report. Most agreed that racial and social disparities were at the core of many of the region's problems, but there were differing opinions and skepticism about how or if they could be overcome. Furthermore, would private philanthropic institutions be interested or receptive to recommendations from a report external to their organizations such as the Commission's? Others raised the issue that most philanthropy is on a local level and that some would not be interested in a regional conversation or approach. At the end of the discussions, though, the foundation received overwhelming encouragement from the groups to implement the Commission's recommendations.

FMS was determined that our journey, the work of the Commission, and Where Hope and History Rhyme would not be labeled simply as a deliverable of a grant and then dismissed. An opportunity to encourage others to move the needle of progress forward with regard to race was too important to let it quietly fade away. FMS recognized that we needed to adopt a carpe diem stance.



To help push conversations of equity to the front burners, several FMS board members invited into their homes those in their communities who either should become better acquainted with FMS's work or would be receptive to a discussion about racial and social equity. Those who attended the "living room" meetings included friends of the board; civic, business, faith, and nonprofit leaders; local philanthropists; and media. These intimate gatherings yielded rich, candid conversation and provided FMS several opportunities to share our experiences, receive feedback, hear diverse perspectives and opinions, and develop new relationships and partnerships.

ADOPTING A NEW MISSION AND PRIORITIES

There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success, than to take the lead in the introduction of a new order of things. Because the innovator has for enemies all those who have done well under the old conditions, and lukewarm defenders in those who may do well under the new.

Machiavelli, The Prince, 1532

Where Hope and History Rhyme was created as a call to action for leadership in the region to "make racial, social, and economic equity the hallmark of the New Mid South." Although FMS board members grappled with its recommendations and the amount of influence it should have on the institution, when the time came to release the report to the region, the board worked to develop both a clear picture of where the Foundation was headed and a plan for how it would use the opportunities and strategies learned from their experiences. FMS took seriously our commitment to transform and to make the necessary adjustments that would better enable our organization to help build philanthropy in the region that is both equitable and inclusive. In February 2005, the Foundation took a significant step in our journey by adopting a new mission statement to demonstrate our commitment to this work.

The Foundation for the Mid South invests in people and strategies that build philanthropy and promote racial, social, and economic equity in Arkansas, Louisiana, and Mississippi.

FMS Mission Statement—revised and adopted February 2005

Upon reading this, some might say, "So what? They are just words on an annual report or a website. How can this truly be a bold and significant step?" Our answer is simple; we believe that this statement directly targets the root causes of many of the social ills facing our region and the rest of the nation. It is significant because it throws away the safety nets that buffer individuals and organizations from the unspoken, unresolved, and messy business of race that still polarizes our society. It is **bold** because in "polite" conversation in the South, the topic of race is rarely tossed out for debate with the honesty, openness, and seriousness that it requires to achieve progress.

It depends on to whom you speak as to whether the discussions of race, inclusion, and opportunity that have taken place in the South have either gone on too long or not long enough. After FMS's experiences, we were affirmed in our belief that there are few things that stir powerful and painful emotions as an open and honest discussion about race and equity. The invisible and unspoken tensions of race and equity are still evident in our region and throughout our country in poor public policies and an education system that continue to separate the haves from the have-nots. In his essay Crazy Sometimes, Leonard Pitts, Jr., provides an interesting commentary on the complexity of identifying the people and conditions that promulgate segregation and alienation in this post-Civil Rights era:

In the days when segregation was a widely accepted political philosophy, those who bore black people ill will had no reason to deny it. Indeed, such people spoke openly and with no evident fear of contradiction—much less stigmatization—about the athletic and intellectual inferiority of blacks and their general unfitness to participate in the social and political life of the nation.

The Civil Rights Movement made those views unfashionable, drove them underground. Which is, of course, not quite the same thing as making them go away.⁴

To reflect our commitment to emphasize the importance of these issues, we purposely chose to include the words "equity" and "race" in our new mission statement. This decision offers the reader little latitude for uncertainty, and allows us no "wiggle room" to skirt these issues.

We acknowledge that many organizations might not be willing or prepared to tackle difficult and potentially divisive issues such as race and equity in their organizations or in their communities. In some cases, organizations could face significant risk if they decide to adopt an agenda for widespread social change in their communities. Some examples of the possible effects resulting from this commitment could be loss of funding; loss of institutional leadership specifically board leadership; and loss of support from traditional community leadership if it becomes threatened or alienated. But the stakes for not addressing the issues of equity and inclusion in communities are much higher; the absence of these discussions or action will only help to perpetuate the status quo.

TACKLING THE CHALLENGES TO LEADERSHIP

...inclusiveness is about change. It is about bringing in persons from different communities and different perspectives and creating safe, equal space and voice. Sometimes it means that our institutions will have to change to honor the perspective of those who reflect a different set of realities, a different set of experiences, and a different relationship to the color line. Change is uncomfortable. Thus far people of color have born the burden of that discomfort.

Handy Lindsey, Jr.

Cameron Foundation, president 12th James A. Joseph Lecturer on Philanthropy in Dallas, Texas in 2003

At times throughout the Building Philanthropy project, it was not clear how the Commission's work would affect our organization. We assumed that staff and board would be expected to look beyond our own current solutions and create or model new and innovative approaches to move the organization beyond its own status quo. But knowing that some sort of transformation was supposed to take place did not help determine how it would occur or what our organization would look like after it happened.

Because of the intense and all-consuming commitment that the institution placed on this process, FMS leadership felt the pressures for both the responsibility and the success for both the Commission and the transformation that FMS was expected to undergo.

FMS's founding CEO, George Penick, described himself as both willing and resistant during the Building philanthropy project and the FMS transformation process. FMS was entering uncharted territory, yet he felt confident that FMS's work that preceded the transformation process was creative, bold, and equitable when compared to that of similar organizations in the region. This opportunity, Penick shared in his essay Navigating Transformation: Uncertainty and Fear of the Unknown, showed him that FMS represented the best choice in the region to move beyond doing good work to becoming "more of a change agent." Some of the resistance that he experienced stemmed from "the fear of the unknown" and not knowing how to successfully accomplish such a difficult and broad task as transformation. Penick also understood that transformation signified two difficult admonitions. The first, he would have to relinquish some control to allow the process to work. And the second that he had to accept that the organization that he raised from inception could be flawed.

One of the most significant outcomes of the process occurred when Penick made a decision to step down as CEO. He was busy balancing the workload of the Mid South Commission to Build Philanthropy and navigating the transformation effort of FMS with his board and staff when he made the realization. In his essay, he wrote

An organization that sets out to truly re-invent itself—by creating a new board, a new institutional ethos, a strengthened governance structure, and a re-orienting of its mission—probably is not best-served by having the same face lead it into its new era.⁵

After the completion and distribution of *Where Hope and History Rhyme*, Penick announced that he would step down as the CEO of the foundation to allow someone else to lead the foundation through the transformation period. Since Penick was the founding president and possessed nearly all of the institution's "memories," his impending departure necessitated the compiling of historical documents, important experiences, and events to create readily accessible resources to impart institutional knowledge on the staff and the incoming CEO.

To read the complete reflection document about the leadership challenges that CEOs must negotiate during the transformation process, please refer to "Part Two: Leadership Challenges / Navigating Transformation: Uncertainty and Fear of the Unknown" by George Penick included in the four-part series *More Than Words*. All publications are available for download online at *fndmidsouth.org*.

Similarly, FMS board members recognized the pressures that would come to rest on them as they played dual roles in the Building Philanthropy project: (1) **commissioners** who learned from the experiences and develop recommendations for a wide range of philanthropy in the region, and (2) **foundation trustees** who were ultimately responsible for the alignment / transformation of FMS to reflect the recommendations.

Board members held open conversations about equity as it related to the board and staff, the Foundation's work, and the region. Internal board memoranda noted that it was essential that the FMS board had a chance to "have it out" before the issues of equity were placed in a larger context before the Commission.⁶ As Commission meetings were often planned to coincide with FMS board meetings, it was not uncommon for the conflicts or questions generated by commissioners to spill over into board meetings.

A significant amount of the FMS board's time was spent discussing how it would relate to, handle, and incorporate the Commission's recommendations. The board had to be thoughtful and deliberate about aligning the recommendations with their work concerning governance, strategic institutional development, and institutional culture and leadership.

The board prioritized the development of new governance structures that would reinforce the importance of our directors reflecting the communities that FMS serves. To this end, the organization's bylaws and the board's policies and procedures were reviewed and revised, and tools were established to ensure an equitable, transparent, and far-reaching recruitment and selection process for new directors and for a new CEO to replace FMS's founding president of 15 years.

For the complete description of the process that the FMS board followed in its efforts to develop a governing board prepared to tackle issues of equity, please review "Part Three: Governance Challenges / Taking Governance Seriously" by Mark Constantine included in the four-part series More Than Words. All publications are available for download online at *fndmidsouth.org*.⁷

CREATING CONDITIONS FOR CHANGE

If you were to rank the fifty states according to any quality-of-life indicator you choose—economic opportunity, education, housing stock, poverty, anything—our three states—Arkansas, Louisiana, and Mississippi—would be pretty much at or near the bottom in every category. Now Katrina and, of course, Rita, too, have taken that hole and made it deeper. How is that an opportunity? Well, it isn't, if all we do is focus on filling that hole back up. Not only would that be an opportunity lost, it would be a great tragedy.

> George Penick, founding president of FMS, interview with Philanthropy News Digest posted online 12/4/05.

When Hurricane Katrina struck on August 29, 2005, FMS was in the midst of tremendous change and uncertainty. Board and staff were in the throes of making sense of all that we had learned and trying to understand how it would affect our transformation. A national search was underway for a new CEO, and the board was halfway through an in-depth process to identify and choose new directors who could lead the foundation into its next era. There was simply not enough bandwidth available at the time to simultaneously address all of the various aspects of transformation that needed to occur. To complicate matters, FMS was overwhelmed with phone calls and offers for grant money to support nonprofits and individuals affected by the hurricanes. As an institution, however, we had not yet begun overhauling our grantmaking strategies, policies, and procedures.

Two concerns were raised immediately: (1) while our intentions were good, we did not want to incidentally cause more harm than good by making poor decisions with our limited resources and (2) we had to ensure that our grantmaking reflected our new mission to promote equity. FMS tapped all of the resources available to us in order to hone our grant processes as quickly and as thoroughly as possible. Over a few weeks time, we solicited input and support from foundations, philanthropists, regional advisory committee members, grantmaking associations, leadership and legal counsel from the Council on Foundations and the Southeastern Council of Foundations, and former Commission members.

> You might not get the 'right' answer to questions in a proposal with regard to equity and inclusion, but it is our responsibility to at least ask the questions.

Comment during a FMS board meeting in Hot Springs, Arkansas - October 2003

As a result, FMS's Grant Committee was restructured and put in place new grant policies, guidelines, and criteria that addressed accountability, transparency, equity and inclusion, and effectiveness. First, our grant application was amended to include requirements from applicants such as (1) the demographics of the area served; (2) a brief narrative that describes how vulnerable and minority populations are served; (3) a list of current and past partners and funders; and (4) the make-up of board and staff. Secondly, the application was standardized to both increase FMS's ability to measure outcomes and impact and make it less cumbersome for our network of longtime grantees to apply for funding. Third, the committee established a point system that increased accountability and reduced subjectivity or favoritism in the review process. The ranking system also helped the Grant Committee to better identify and support the organizations either working or well positioned to address issues of equity. And finally, the committee developed procedures for mandatory staff-conducted site visits. The goals of the visits were to physically assess the capacity of the organization; determine the level of success of the grant provided; and learn from and strengthen the relationship with the grantee.

FMS had received substantial support for hurricane recovery, but we knew that our funds would only be a blip on the radar in comparison to the billions that would ultimately come to Louisiana and Mississippi. While we moved forward to make sure our strategies and actions "in here" were appropriate and thoughtful, we felt a duty to the region to voice concern that others "out there" took responsible action to meet the needs of the people and the issues in the region. George Penick, motivated by his experiences as both a grantmaker and a grantee and his knowledge about how philanthropy typically conducts its business, wrote a provocative editorial for the Chronicle of Philanthropy following Katrina that urged philanthropy to respond wisely and thoughtfully to the disasters. He wrote

The end result of hundreds of millions of dollars of private philanthropic funds, combined with billions of government support, must not be the rebuilding of communities of exclusion, of institutionalized poverty, and of ignored racism.

As donors respond to Hurricane Katrina, it is important to remember that philanthropy's role is to make conditions better than they were, to bring about much-needed change in society, and to raise difficult issues.8

The complete editorial "What Philanthropy Owes Katrina Victims" by George Penick that appeared in the Chronicle of Philanthropy on September 15, 2005 is provided on page 26—reprinted with permission from the Chronicle of Philanthropy. The editorial is also available for online viewing at www.philanthropy.com/free/articles/v17/ i23/23003701.htm.

Looking back at our experiences since the disasters, Katrina and Rita provided an unexpected impetus for FMS to shift from rhetoric to action. At a time when we were unsure about how we were going to pique the interest of grantmakers and nonprofits and acquire increased resources to address issues of racial, social, and economic equity in the Mid South, Katrina blew in and did the work for us by elevating the urgency to address these issues. Due to our unique regional approach and our long history of leadership in the region, we received millions of dollars and provided over 4,200 grants for relief, recovery, and rebuilding efforts in the region. But—more importantly because of FMS's learning journey, we accepted the money with a much better understanding of how it could be used and leveraged to create the conditions for social change, as well as to rebuild devastated communities.



New Orleans residents and other volunteers from over 40 states worked together to complete a KaBoom! playground on the Woodmere Elementary School campus. This playground is significant because—a year and a half after Katrina—the entire student body attended classes in trailers (notice the roof sheared off of the school pictured behind the playground). KaBoom! is just one of many examples of an FMS grantee that has been extremely successful because they worked with residents to recover in ways that benefit the entire community.

CHAPTER 4

CONCLUSION

WHAT WE ARE LEARNING ON OUR JOURNEY

After several years of working to emphasize racial, social, and economic equity, the Foundation for the Mid South has adopted several strategies to help guide its work to create the conditions conducive to social change. Each strategy will conclude with a paragraph that provides examples of specific actions taken by FMS and any outcomes from our efforts.

LEARN FROM AND EMPOWER PEOPLE IN LOCAL COMMUNITIES WHO ARE WORKING TO BUILD MORE JUST AND EQUITABLE COMMUNITIES.

We support the notion that philanthropy should not serve as a substitute for government to promote the general welfare of citizens. We also firmly believe the idea that philanthropy should not work in a way that reduces the interest or initiative of our citizens to better their own communities and lives. Philanthropy should invest in strategies that help each sector to fulfill its obligations more effectively. The challenges lay in encouraging civic participation in those who have been left out of the decision-making process in their communities and in gaining their trust. Some believe that philanthropy is guilty of doing to these people when we should be *doing with* them. This is too often the case when we feel that we have to model, test, and measure our programs and ideas instead of listening to and partnering with those who will remain long after our grants and programs are gone.

FMS ACTIONS: As a direct result of the Building Philanthropy project, the Foundation established partnerships with other foundations, nonprofits, and individuals to expand the concept of community philanthropy. The goal of this work is to help Mid South communities—places full of creative and resourceful people who want a better quality of life—help themselves. The focus is on helping build indigenous and inclusive philanthropy in the Mid South.

MOVE GRANTMAKING BEYOND THE CHARITY MODEL OF PHILANTHROPY

FMS recognizes that giving for relief (charity) as described by authors Elizabeth Lynn and D. Susan Wisely will always remain a tradition in philanthropy. But we believe that true and sustainable transformation—long-term positive change—has to be initiated from within. Philanthropy must take the initiative and responsibility to tap the intellectual, social, and financial resources in our region to strengthen our communities to make them less dependent on charity and to make use of the assets they already possess. Community leaders must invest their resources in the future health and well-being of their communities and create opportunities for the people who live there. It will then be philanthropy's responsibility to provide additional financial and human resources to enable communities to be successful in their efforts.

This is the understanding of *community philanthropy* that we are incorporating into our planning, our initiative development, our assessments and measurements, and our grantmaking—particularly with regard to how our investments can help communities develop their own long-term assets; promote equity and inclusion; and support leadership development and policy change and advocacy.

FMS ACTIONS: It has been FMS's own experience that good intentions do not necessarily equate to effective grantmaking. While there are countless ways to improve effectiveness in both the grants process and decision-making, we sought to assess our grantmaking by comparing our grants policies, procedures, request for proposals, and selection criteria to several organizations and associations of grantmakers that are well-established and considered effective grantmakers. From this process, we developed the following list of guidelines to reinforce our commitment to strive to make grants that are both effective and produce positive results:

- Understand the area and the capacity of the nonprofits you serve.
- Understand the capacity of your own organization.
- Mind your mission, but be flexible and strive to meet the need.
- Seek the counsel of those most affected.
- Be accountable for and transparent in the grants process and the decisions you make.
- Take the long view to create the conditions for social change.

DIVERSIFY GOVERNING BOARDS AND STAFFS OF THE REGION'S PHILANTHROPIC **ORGANIZATIONS**

Issues in the Mid South have been viewed primarily as either black or white since the demographics in our region favored these two perspectives. Similar to the rest of the country, the makeup of the Mid South is changing at a fast pace. But is the composition of the boards and staff of the Mid South's philanthropic organizations and nonprofits reflecting these changes? Since philanthropy has used its resources to develop solutions to lift up marginalized and vulnerable populations, it is important that the voices of these populations are included and taken seriously in staff- and board-level discussions.

FMS ACTIONS: The FMS board charged its Governance Committee to develop a process that would build a governing board that is well equipped to lead the Foundation as it works more deliberately on issues of equity. Within five months, the committee's plan was completed, adopted by the board, and the process was set in motion. The new governance procedures resulted in seven additions to the board (five of whom were people of color); three expired board member terms; two founding board members named Director Emeritus; and a national at-large position phased out. Another significant aspect of this transformation was the selection of the board's leadership. Truddie Kibbe Reed, formerly of Little Rock, Arkansas, and Beverly Wade Hogan of Jackson, Mississippi—both African American women—were the first and second persons of color selected to serve as board chairs

For greater detail on the process the board followed and the tools and documents generated throughout the board's selection process, please refer to "Part Three: Governance / Taking Governance Seriously" by Mark Constantine included in the four-part series More Than Words. All publications are available for download online at fndmidsouth.org.

INCREASE THE POSSIBILITY OF EQUITY BEING REALIZED BY SUPPORTING WORK THAT PROMOTES THE DEVELOPMENT OF EQUITABLE PUBLIC POLICIES.

Systems and policy change is a key component to creating the conditions for social change. One need only look at the progress made for African-American civil rights after laws were established eliminating segregation in public schools. FMS suggests that issues of race and equity could be addressed more successfully if foundations—particularly those in the region—increase the amount of resources that they invest in organizations and people working to improve public policies. And if foundations are not already providing these resources, they should consider starting. Why? While it is important to provide support directly to nonprofits for their programs and operations, by not supporting those that influence public policy and enabling them to "lift up" the need for effective solutions to social disparities, positive change would be slow to occur.

FMS ACTIONS: With this in mind, the FMS board and staff worked together to develop a *Theory of Change* document that outlines specific activities and roles that are necessary to effect real change in the region.⁹ The development of this document allowed FMS leadership to "see" the progression of FMS's work throughout the life cycles of our initiatives. The model demonstrates that, while quality work may have occurred to improve aspects of a specific issue, unless changes occur at the policy level it is highly unlikely that foundations and nonprofits are making substantial and long-term impact in their efforts.

EMBRACE AND NURTURE THE CREATIVITY, ENERGY, AND ASSETS OF THE REGION'S DIVERSE CITIZENRY.

Success in building equitable philanthropy and financial and human resources for the long term in the Mid South is dependent on the investment and cultivation in new and emerging leadership. Any significant work done now on the issues of race and equity could be forfeit if willing and capable people—especially young people—are denied opportunities to engage in and contribute to the dialogue and activities that influence philanthropy.

FMS ACTIONS: A significant outcome from the project was the creation of both an expatriate and a black philanthropy initiative at FMS to help expand the number and the diversity of our donors. Through these new approaches, we are identifying, cultivating, reaching out to, and engaging nontraditional leaders and donors—specifically young adults of color—in philanthropy.¹⁰

A FEW WORDS OF ENCOURAGEMENT

We understand that no single organization can hope to immediately elevate the importance of the discussion of race, equity, and justice in the philanthropic institutions and nonprofits in a state or city, much less in an entire region. There are too many diverse organizations facing too many different pressures to expect immediate action to take place. Our hope is that by FMS working through this process and sharing our experiences, others will commit to begin or continue similar conversations and carry out the work that will pave the way to just and equitable communities.

As we offer this document to our colleagues, we encourage you to share your own organization's experiences, insights, and challenges in racial and social equity and inclusion with your peers. The result does not have to be a fancy report; it can begin simply as a meeting or an e-mail. As we learn and share more about the complexity and nuances of change and transformation in our own backyard, our regional philanthropy will continue the process to become an effective catalyst for change as well as a learning community. And when we are not working in silos, but questioning and pushing ourselves and others, we tend to be surprised and invigorated when reminded of the tremendous potential that lies before us here in the Mid South.

IF YOU FOUND THIS RESOURCE INTERESTING OR HELPFUL, PLEASE REFER TO THE OTHER VOLUMES IN OUR FOUR-PART RESOURCE, MORE THAN WORDS.

These documents plus the Mid South Commission to Build Philanthropy's report "Where Hope and History Rhyme" are available for download at www.fndmidsouth.org.



Organizational Transformation

A description of the Foundation for the Mid South's organizational transformation emphasizing racial, social, and economic equity.



Governance Challenges

A description of the process that the FMS board followed in its efforts to develop directors who are well prepared to promote equity and inclusion.



Leadership Challenges

A reflection on the challenges that CEOs must negotiate as they work with both board and staff through the transformation process.



Importance of Documentation

An assessment of how documentation can enhance the organizational transformation process.

What Philanthropy Owes Katrina's Victims

By George D. Penick

Philanthropy has the opportunity to make a huge difference in the lives of hundreds of thousands of people as it responds to the devastation wrought by Hurricane Katrina. But the risk is great that large sums will be spent unwisely, and that a major opportunity to change the way that society includes and cares for all of its people will be lost.

In the coming months and years, more philanthropic dollars will flow into Gulf Coast states than has ever been imagined. The big question is whether that money will be used to rebuild shattered communities in ways that are equitable and just or whether it will largely be invested in ways that simply re-establish the racial and social inequities that have been so starkly captured by television news cameras from around the world.

Philanthropy can no longer ignore or avoid the harsh reality that poverty, especially among minorities, lies at the heart of the most unseemly aspects of the Hurricane Katrina debacle. As leaders of foundations, we must take responsibility for the fact that we have failed the poorest citizens in our country by not keeping them safe, by not providing opportunities equal to those of the middle class, and by not treating them as equal members of society. In one way, the hurricane caused damage and distress to all—rich and poor alike—but in recent days, it is been made painfully clear how poorly society supports those who have the least ability to provide for themselves in a time of crisis.

Because the philanthropic response to the Gulf Coast destruction will largely be financed by national foundations and corporations from outside the areas that sustained the most damage, it is important for those grant makers, and other major donors, to make a sincere effort to understand how they can make a tangible difference, or at the very least not inflict more harm on people who have already suffered enough.

Following are the kinds of questions that people in philanthropy should consider as they decide how to respond to the devastation caused by Hurricane Katrina:

- Who will rebuild the communities torn apart by the storm? It is important to look beyond the immediate needs of providing people with temporary shelter, meals, and other necessities and to keep an eye on what must be rebuilt, and how it can be done in a way that leads to the creation of equitable communities. The relief charities and government emergency-response agencies will soon leave, and philanthropy needs to be ready to help people and communities get on with their lives.
- Will the people who need help the most get it? Donors must be willing to trust local people and work with them, or else they will give their money and support to groups that are based outside the region hurt by Katrina. Grant makers need to look for organizations that have a sound understanding of the people, the community, and the conditions of the Gulf Coast, and they need to rely on organizations that understand how the power structure works. Otherwise, aid will never get to those who truly need it.
- What role should a foundation or corporation play given the vast amounts of government funds that are being provided for relief and recovery? Because philanthropic dollars are so much smaller, but so much more flexible, than those awarded by governments at all levels, donors should look for ways to serve people whom governments cannot or will not assist. It makes no sense to duplicate effort or to use philanthropic funds where they will make little or no difference.

- Will rural areas get the help they need? The damage from Katrina goes far inland for hundreds of miles where homes have been destroyed, infrastructure severely damaged, and jobs lost—both temporarily and permanently. The rural areas and small towns are far from the usual sources of aid and assistance, and they have far fewer financial resources of their own to draw on.
- What needs to be done next? The advance warnings about the storm saved the lives of hundreds of thousands of people, a fact that has been overlooked in the wake of the relief fiasco in New Orleans and elsewhere. But the people who fled inland before Katrina struck land are being supported by stretched local resources in places throughout Louisiana, Arkansas, Mississippi, and elsewhere. Many cities and towns have doubled in size in the past two weeks, and most of the new residents have nothing beyond what they could throw into a suitcase. Families are sleeping on the floors of community centers and sending their children to local schools that already are overcrowded and poorly equipped.

These people will need transitional support for the next 3 to 12 months to get them out of mass shelters and into more stable and healthy living situations until they can return home. Schools and social-service organizations attempting to serve these new community members will be overwhelmed by demands for help, and they will need plenty of money and other resources to do their jobs well.

• How can grant makers be most helpful? Foundations and other donors need to make sure they do not impose their own spending priorities on charities that are working hard to serve people in need. Grant makers must avoid their usual tendency to establish their own narrow programs and impose their usual guidelines, grant-making criteria, and restrictions on who is eligible. One of the worst situations imaginable would be for local organizations to have to contend with a hundred grant-making efforts financed by different donors who have made no effort to communicate and collaborate with one another.

It is important that national grant makers work closely with people who are nearest to the action, such as community foundations, and with other donors who are trying to reach people who desperately need assistance. Going it alone will not help anyone.

- How can foundations exert their leadership roles? Along the Gulf Coast, nonprofit groups have not had the strength or the standing in public debate that they do elsewhere, so national grant makers must do far more than write checks. National grant makers and charities must work with local nonprofit groups to use their credibility, influence, and leverage to make sure that the voices of everyone are heard, that the needs of the whole community are met, and that concerns about equity and fairness are considered in every step of the rebuilding process.
- Will foundations do what it takes to help the poor? Donors can make a big difference by using their resources and influence to collaborate with financial institutions, community colleges, and business and political leaders so that their practices during the recovery are designed to support the most vulnerable members of society. The recovery will provide economic opportunity for new construction, for jobs to rebuild the infrastructure, and for entrepreneurs to provide the needed services. At the same time, it is important to change the way that business as usual has been conducted in a region where political influence, established networks, biased hiring practices, and government-subsidized investments have historically closed out so many Americans.

Will foundations be willing to provide money to advocacy groups who want to influence the recovery and rebuilding plans? Since state and government resources will be much larger than those of private philanthropy, foundations and corporations must support organizations that will work to ensure that policies are equitable, that the political process is fair, and that access to financing opportunities is available to all. For example, advocacy groups will need to ensure that zoning, banking, and housing policies do not re-ghettoize the cities of the Gulf Coast, and they will need to demand that safe housing is provided to low-income people in rural communities. They should not be forced to live in trailers and mobile homes.

Foundations and corporations often respond to high-profile catastrophes like Hurricane Katrina simply by writing big checks before they have made any effort to understand conditions in the disaster area or figure out which organizations have the most credibility and best performance records. Too often, grant makers do not take the time to establish networks that will lead them to those who know the situation best, so they dole out money to organizations that are bureaucratic and lack an understanding of what a community needs. No wonder the influx of immediate disaster donations rarely makes a big difference to communities harmed by natural disasters or other crises.

This year the Mid South Commission to Build Philanthropy, a group of nonprofit, foundation, and corporate leaders, called on grant makers in the region to see philanthropy as much more than the rich giving to the poor. It urged foundations and other grant makers to pursue philanthropy in a way that makes full use of the time and skills of volunteers and leaders of the entire community rather than relying simply on the resources provided by the wealthy few.

As philanthropy faces one of the biggest challenges in history, can grant makers be self-critical enough to change the way they typically do business and pursue this new form of giving? Are they willing to take risks to support groups that may not be well-established, but that know how to help the poorest of the poor rebuild their lives with dignity and respect?

The end result of hundreds of millions of dollars of private philanthropic funds, combined with billions of government support, must not be the rebuilding of communities of exclusion, of institutionalized poverty, and of ignored racism.

As donors respond to Hurricane Katrina, it is important to remember that philanthropy's role is to make conditions better than they were, to bring about much-needed change in society, and to raise difficult issues.

In the words of the Mid South Commission to Build Philanthropy, this is one of those rare times when "hope and history rhyme."

The history of our region—both that of which we are proud and also that of which we are forever ashamed—can rhyme with a hope for a better future. More than government and more than business, philanthropy in its fullest and broadest sense can be the leader to make that happen—but to do so, philanthropy must be willing and able to change how it operates.

"What Philanthropy Owes Katrina Victims" by George Penick was originally published by the Chronicle of Philanthropy on September 15, 2005. This editorial is reprinted with permission from the Chronicle of Philanthropy and is also available for online viewing at www.philanthropy.com/free/articles/v17/i23/23003701.htm.

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- 3 Readers interested in learning more about identifying and harnessing nontraditional philanthropy should review FMS's Where Hope and History Rhyme: Reflections and Findings from the Mid South Commission to Build Philanthropy available online at http://www.fndmidsouth.org/Bp_commission.htm (Mark Constantine, 2005). For greater detail on the progression of the Commission, review the memoranda in the appendix of More Than Words "Part Four: Documentation Matters" (Mark Constantine, 2008).
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- 5 George Penick, "Part Two: Navigating Transformation: Uncertainty and Fear of the Unknown" from the four-part series More Than Words (Foundation for the Mid South, 2008).
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- 7 Mark Constantine, "Part Three: Taking Governance Seriously" from the four-part series <u>More Than Words</u> (Foundation for the Mid South, 2008).
- 8 George Penick, "What Philanthropy Owes Katrina Victims" published in the Chronicle of Philanthropy September 15, 2005.
- 9 Foundation for the Mid South, FMS Theory of Change (2004).
- 10 An example of this work can be seen in (1) the Foundation for the Mid South's website for the Raised Up Right Fund at http://www.raisedupright.org; and (2) the upcoming 21st Century Do-Gooders campaign.

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