



SOCIAL POLICY RESEARCH
ASSOCIATES

Building Capacity Through a Technical Assistance Strategy: Promising Approaches

Community Leadership Project (CLP) 2011 Evaluation Report

June 19, 2012

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Contents

Overview of TA Approach.....	2
Focus of Technical Assistance	6
Technical Assistance Strategies.....	8
Emerging Findings on Promising Technical Assistance Approaches	11

Building Capacity Through a Technical Assistance Strategy: Promising Approaches

Prepared by SPR

The Community Leadership Project (CLP) is a collaborative effort to strengthen the leadership and organizational capacities of small organizations serving low-income people and communities of color in the San Francisco Bay Area, Central Coast, and San Joaquin Valley. With funding from the David and Lucile Packard Foundation, the James Irvine Foundation, and the William and Flora Hewlett Foundation, 27 well-established intermediary organizations—community foundations, grantmaking public charities, and funder affinity groups—engage in three distinct but related strategies to enhance the capacity of community-based organizations to improve the lives of those who live in the communities they serve.¹ The primary strategy is “regranting” to provide core financial support and tailored organizational development assistance and coaching to small to mid-size organizations. Technical assistance is the second strategy with focused supports around issues such as finances, and technology. The third strategy is leadership development, whereby ten intermediaries provide executive directors and other organizational leaders with access to various leadership supports and opportunities.

Together these three strategies are intended to build community organizations’ adaptive capacity, leadership capacity, operational/management capacity, programmatic capacity, and community/collaborative capacity.² The hypothesis is that by strengthening these capacities, organizations will be stronger and more capable of accessing funding from foundations. In addition to developing stronger organizations, the CLP initiative is seeking to develop the pipeline through which talented people of color emerge from their communities as leaders.

The evaluation is interested in understanding not only the impact of CLP on leaders, organizations, intermediaries, and foundation partners, but also the key lessons on: (1) reaching and providing capacity-building supports to organizations and leaders serving low-income communities and communities of color; (2) characteristics of effective, culturally relevant, and community-responsive capacity building; and (3) which kinds of capacity-building supports are

¹ As of Fall 2011, more than 100 community-based organizations have received multi-year core support and tailored organizational development assistance and coaching within the regranting strategy. The average regrant amount received by community organizations is \$33,894 over two or three years. In addition, approximately 330 participants have received targeted trainings and technical assistance in key organizational development areas, and more than 280 leaders have participated in leadership development programs with deep experience working with leaders of color.

² These capacities were adapted from the TCC Group’s Core Capacity Building Model.

most effective for small and mid-sized organizations serving low-income communities and communities of color.

Overview of TA Approach

The Community Leadership Project funded six intermediaries to provide targeted Technical Assistance (TA) to community organizations serving low-income people and communities of color in the three target regions. The intermediaries were selected because they had an established track record of providing TA in California, including ties to existing community organizations, and a framework or approach that embraces cultural competence and equity. Exhibit 1 provides an overview of TA intermediaries’ mission, regional targets, criteria for who to work with, and number of organizations worked with to date.

**Exhibit 1:
Overview of TA intermediaries**

TA Intermediary (grant size)	Mission	Regions	Selection Criteria	Organizations served to date
CompassPoint Nonprofit Services (CP) \$500,000	To increase the impact of nonprofit community-based organizations and the people who work and volunteer in them.	Bay Area and San Joaquin Valley*	All organizations in the Leadership and Regranting strategies were eligible to receive TA services. They had a separate partnership with CRLA and ILRC for more tailored TA. For the Fundraising Academy for Communities of Color (FACC), interested organizations had to have board approval to attend.	71 organizations (goal of 75 over three years)
Families In Schools (FIS) \$150,000	To involve parents and communities in their children’s education to achieve lifelong success.	San Joaquin Valley	All organizations must have: <ol style="list-style-type: none"> 1. 501(c)(3) status; 2. work in children, youth, family and/or education arenas; 3. at least 3 years of incorporation; 4. an annual budget of between \$25,000 and \$2 million. 	27 organizations (goal 45 over 3 years)
National Community Development Institute (NCDI) \$150,000	To build capacity for social change in communities of color and other marginalized communities in a culturally-based way.	Bay Area and Central Coast	Organizations must have: <ol style="list-style-type: none"> 1. budgets under \$800,000; 2. an explicit desire to do staff and board capacity building; 3. staff members of color who would benefit from the training; and 4. an articulated social justice perspective. 	7 organizations ³

³ Although all organizations were supposed to receive individualized TA, only one of the seven organizations served by NCDI received this.

TA Intermediary (grant size)	Mission	Regions	Selection Criteria	Organizations served to date
Nonprofit Finance Fund (NFF) \$150,000	To create a strong, well-capitalized and durable nonprofit sector that connects money to mission effectively.	Central Coast and San Joaquin Valley	Prefer to work with organizations that have: <ol style="list-style-type: none"> 1. 501(c)(3) status for 3 years, 2. budgets of at least \$250,000 per year (for CLP they created different interventions for organizations below \$250,000 and above \$250,000), 3. audited financial statements. 	123 organizations
Silicon Valley Council of Nonprofits (SVCN) \$150,000	To magnify the influence and contribution of health and human service nonprofit businesses in Santa Clara County, in part through support for ethnic leaders.	Bay Area	All organizations have to: <ol style="list-style-type: none"> 1. have 501(c)(3) status; 2. be ethnically-led nonprofits working in health and human services, or 3. be willing to become, Silicon Valley Council of Nonprofits members. 	16 organizations
ZeroDivide \$300,000	To achieve a “zero digital divide,” as the digital divide is part of the set of social, economic, political and cultural divides that separate the haves from the have-nots.	Bay Area, Central Coast* and San Joaquin Valley	Organizations that received mini-grants and more intensive support were selected using the following criteria: <ol style="list-style-type: none"> 1. geographic and demographic diversity; 2. technological need; 3. staff capacity; 4. commitment to technology integration over the long term; Note: ZeroDivide did not use budget as a criteria—budgets ranged from under \$50,000 to \$2 million.	64 took survey, with 8 in-depth assessments (targeting 100, with 20 in-depth assessments)

Note: *means new geographical area

As illustrated in Exhibit 1, TA intermediaries received grants of between \$150,000 to \$500,000 to serve organizations in one or more of the target regions. Although TA intermediaries generally had ties to the target areas, these varied in depth. Several intermediaries, for instance, were relatively new to the San Joaquin Valley community or the Central Coast. As will be discussed further in the TA strategies section, TA intermediaries varied considerably in the depth of the TA they provided. ZeroDivide, for instance, provided relatively “light touch” services to many organizations, while Silicon Valley Council of Nonprofits (SVCN) provided “higher touch” services to fewer organizations. CompassPoint (CP) Nonprofit Services and ZeroDivide chose to do a combination of “light touch” and “higher touch” TA. The following are some observations about the TA intermediaries.

- **The mission of the TA intermediaries were generally well aligned with CLP, with several having an explicit focus on promoting equity and grassroots leadership.** Evidence of alignment of mission demonstrates that these TA intermediaries are able to build upon previous body of work/expertise, as they reach out to new types of organizations or new communities as part of their participation in CLP. Some organizations, such as ZeroDivide and NFF, have very targeted mission statements and they provided focused TA that was clearly tied to their mission. FIS, in contrast, used the CLP project to branch into new territory, placing a much stronger focus on organizational capacity building than they had previously, but remaining true to their focus on supporting education and youth-serving organizations. The remaining three intermediaries (CPNS, NCDI, and SVCN) have broad missions to enhance the capacity of nonprofit organizations and these intermediaries supported a range of leadership and operational training opportunities tied to the goals of the CLP initiative.
- **Each TA intermediary identified certain criteria or guidelines as to what characteristics indicated that a participant organization was “ready” to receive TA.** Most intermediaries, for instance, identified a minimum budget for the target organizations, using budget as a sign of the organization’s current level of sophistication and capacity. Other eligibility criteria, such as 501(c)(3) status and number of years incorporated, were also designed to gauge the readiness of participants to engage in TA and to improve their organizations. TA providers noted that having some kind of threshold for measuring readiness was important for a number of reasons, not the least of which was considering whether or not it was even feasible for an organization to send someone out for training. As the FIS program coordinator explained:

If your budget is so small that you can barely afford the mileage it would cost you to actually get [to the training], then that’s a challenge.

Moreover, knowing where an organization falls in relation to a “readiness threshold” helps the TA provider develop a more realistic expectation for the level of learning one could expect, given the organizational context. Organizations that are in survival or crisis mode, for example, would likely be focusing their energies on putting out fires or keeping their doors open, thereby leaving little capacity for long-term visioning. As the program coordinator for NFF notes:

If you’re struggling to meet payroll every week, you’re probably not at a place where you’re able to...think about that bigger picture.

- **In a few cases, intermediaries lowered their budget criteria in order to be more inclusive and responsive to the goals of CLP.** FIS, for instance, originally aimed to work with organizations that had a minimum budget of \$125,000 but eventually lowered this to \$25,000 in order to be inclusive. Similarly, although NFF does not usually work with organizations with a budget under \$250,000, under CLP NFF created workshops focused on organizations under \$250,000, as well as tailoring workshops to organizations with budgets over \$500,000. In

some cases, TA intermediaries found that having organizations of varied sizes made their trainings more dynamic and interesting. The program coordinator of CompassPoint said,

Groups with larger budgets were able to help groups that were smaller...The small groups were able to talk about their small base and volunteer support and that was really grounding for the larger groups.

- **Only a few intermediaries used cultural competency or diversity as a criteria for participation in TA.** NCDI looked for organizations that had a demonstrated “social justice perspective,” while SVCN looked to recruit and work with organizations with “ethnic leadership.” In keeping with the goals of CLP, however, all TA providers targeted organizations that served low-income people and communities of color.
- **TA intermediaries reported that the most important criteria for selection was that participants have the organizational backing and support needed to implement their learning within their organizations.** Some TA intermediaries put into place certain requirements to try to ensure that folks can not only *participate meaningfully* but to make sure they can *implement their learning*. FIS, for example, made it a requirement that the ED and a board member attend their trainings, to ensure that the learning was done “by someone with authority to implement the learning organization-wide.” Similarly, in order to participate in CP’s Fundraising Academy for Communities of Color (FACC), the participating organizations needed to commit to the time it would take to participate in the training and they also needed to have full board support. TA providers found that, given the small size of the organizations, TA is most productive if it engages executive directors and key board members.
- **Individual readiness and “willingness to learn” can be sufficient to make forward progress.** Although leaders and staff from organizations with a high level of “readiness” are better positioned to immediately apply lessons gleaned from TA, TA intermediaries wanted to make it clear that all of the participants that they worked with were “ready for something” and that they benefited from the support they received. If the participants have an open mind and take the lessons to heart then they will eventually apply those lessons to their work. The program coordinator of NFF said,

We have worked with organizations that were really in financial distress and [yet they] did engage... and see what we were talking about that was bigger picture. [The bigger picture perspective] might not be immediately applicable to them, because they had to deal with that crisis situation, but in the course of planning next year’s budget they knew that they needed to do things differently.

Having provided this broad overview of TA intermediaries and their targeted TA participants, we now discuss some of the specifics related to the (1) focus of the TA, (2) TA strategies, and (3)

emerging findings on effective approaches for providing culturally competent and relevant TA to small organizations serving low-income people and communities of color.

Focus of Technical Assistance

CLP aims to enhance the competence of nonprofit organizations serving low-income people and communities of color, particularly as it relates to five core capacity areas: leadership capacities, operational capacities, adaptive capacities, programmatic capacities, and community/collaborative capacities. Exhibit 2 highlights how the focal areas of the six TA intermediary organizations map to the five core CLP capacities.

As illustrated in Exhibit 2, TA intermediaries varied in their capacity-building foci, both in terms of the nature and breadth of the capacities that they focused on.

- **In general, those that provided support in only one capacity area reached more organizations with a “lighter” but more focused “touch” than those that provided support in multiple capacity areas.** ZeroDivide and NFF, for instance, were able to reach many different organizations because their capacity building focus was very specific. NCDI, on the other hand, took a more organic approach, which involved working with seven organizations over the course of the three years, with a plan to tailor capacity support to the needs of each organization. In the case of ZeroDivide, participants spoke positively of the TA, in part, because it was so specific and clear in its focus. The program officer of the Hewlett Foundation reported,

I've heard from many community grantees about the fantastic work of ZeroDivide in helping them understand the application of technology in their organization.

**Exhibit 2:
Focus of Capacity Building Efforts⁴**

TA Intermediary	Leadership Capacity	Operational Capacity	Adaptive Capacity	Programmatic Capacity	Community/ Collaborative Capacity
CompassPoint Nonprofit Services (CP)	<ul style="list-style-type: none"> • Leadership and Decision-making • Sustainability of leaders • Time management 	<ul style="list-style-type: none"> • Management • Fundraising 	<ul style="list-style-type: none"> • Organizational sustainability 		<ul style="list-style-type: none"> • Peer Networking
Families in Schools (FIS)		<ul style="list-style-type: none"> • Fundraising 	<ul style="list-style-type: none"> • Strategic planning 	<ul style="list-style-type: none"> • Program evaluation 	<ul style="list-style-type: none"> • Network connectedness
National Community Development Institute (NCDI)	<ul style="list-style-type: none"> • Leadership capacity 			<ul style="list-style-type: none"> • Asset-based service approaches 	
Nonprofit Finance Fund (NFF)		<ul style="list-style-type: none"> • Fiscal Management 			
Silicon Valley Council of Nonprofits (SVCN)	<ul style="list-style-type: none"> • Leadership development • Board development 	<ul style="list-style-type: none"> • Fundraising 			<ul style="list-style-type: none"> • Networking and advocacy
ZeroDivide		<ul style="list-style-type: none"> • Technology and information systems 			

- **The most common focal areas for TA are leadership and operational capacity, with intermediaries placing less focus on programmatic, adaptive, or community/collaborative capacity.** As community-based organizations serving low-income people and communities of color, participant organizations tended to need less TA support in how to operate programs or engage their communities. TA providers, therefore, generally focused on issues such as board

⁴ Although TA intermediaries tended to target specific capacities, these capacity areas are very interconnected, and providers often provided informal support outside of their core focal areas.

development, management, fundraising, and fiscal management. The project coordinator of NCDI described the importance not only of leadership development, but also of succession planning, which is more of an adaptive capacity.

The issue of leadership has always been a challenge for non-profits. Whether these organizations are succession planning or grooming people internally to take over, I think that is something that is always on the backburner of everyday work... It is a major issue as we move forward, working with nonprofits to think not just about the present and emerging issues but the planning of future leadership.

- **Although TA intermediaries tended to target specific capacities, these capacity areas are very interconnected.** FIS, for instance, intended to focus TA efforts on adaptive capacity, with a particular focus on strategic planning. In working with participants, however, it became clear that strategic planning has implications for how organizations approach fundraising, program design, and networking. FIS worked flexibly with its cohort in order to provide supports in these different areas, even though it deviated somewhat from their initial plan. The project coordinator of FIS said,

We thought they were ready to talk about topics in terms of what adaptive capacity is and how do move in that respect. They were not ready for that, but they were ready for other things... [so we had to figure] how we can tie adaptive capacity to what they were ready for.

TA intermediaries likely support organizations in ways that do not map directly to their areas of focus, though this we will not have data to support this until the survey of TA impacts is conducted.

Technical Assistance Strategies

Intermediaries used a variety of different strategies to build participants' capacity, including workshops, participant convenings, individualized TA, cohorts, and mini-grants. As is summarized in Exhibit 3, TA strategies vary considerably in their intensity, from one-time workshops to intensive cohort models. Most TA intermediaries used multiple strategies over the course of the initiative, at times shifting their strategies as the initiative evolved, so that they could reach a level of training frequency and intensity that would help increase participants' capacities, while not demanding too much of their time.

- **Four of the TA intermediaries supported a cohort model, designed to support peer sharing and relationship building between like-minded organizations over time.** The length of time that cohorts met ranged from three months, in the case of CP's Management 101 Learning Circles, to three years in the case of NCDI. Cohort-based learning appeared to be of high value for both TA intermediaries and for participants. Because none of the TA intermediaries is

based in the San Joaquin Valley or the Central Coast, a cohort-based approach is an efficient way of providing services to a larger group of participants. Peer support and learning was also of particular value in the context of the CLP initiative, because peer organizations were often the most knowledgeable about community resources and challenges. They were able to provide a grounded level of support to fellow participants.

**Exhibit 3:
TA Intermediary Strategies**

TA Intermediary	Workshops/ Light touch	Participant Convenings	Individualized/ Tailored TA	Cohort model	Mini- grants
CompassPoint Nonprofit Services (CP)	<ul style="list-style-type: none"> • Full day workshops for CRLA and ILRA grantees⁵ 	<ul style="list-style-type: none"> • 2-3 day convenings for ED 101 and Management 101⁶ • FACC⁷: monthly meetings for 8 months • One convening for CRLA and ILRC grantees 	<ul style="list-style-type: none"> • 19 FACC grantees • CRLA and IRLC grantees 	<ul style="list-style-type: none"> • Learning circle, 3 months post- ED 101 and Management 101 convening • 8 month cohort for FACC 	
Families in Schools (FIS)		<ul style="list-style-type: none"> • 4 one-day convenings per cohort 	<ul style="list-style-type: none"> • One organization 	<ul style="list-style-type: none"> • Three one-year cohorts 	
National Community Development Institute (NCDI)		<ul style="list-style-type: none"> • 2 one-day per year 	<ul style="list-style-type: none"> • One organization 	<ul style="list-style-type: none"> • One three year cohort 	
Nonprofit Finance Fund (NFF)	<ul style="list-style-type: none"> • Four 3-4 hour workshops/ year • Webinars 	<ul style="list-style-type: none"> • 2 day financial clinic* 	<ul style="list-style-type: none"> • 8 organizations 		
Silicon Valley Council of Nonprofits (SVCN)		<ul style="list-style-type: none"> • Monthly meetings for 18 months (per cohort) 	<ul style="list-style-type: none"> • 16 organizations 	<ul style="list-style-type: none"> • Two 18 month cohorts 	<ul style="list-style-type: none"> • \$2500 mini-grants
ZeroDivide	<ul style="list-style-type: none"> • Technology assessments 	<ul style="list-style-type: none"> • 3-5 regional convenings* 	<ul style="list-style-type: none"> • 20 organizations* 		<ul style="list-style-type: none"> • \$5000 mini-grant

Note: * Intermediary has plans to implement in year three

⁵ CompassPoint partnered with two regranting organizations, California Rural Legal Assistance (CRLA) and Immigrant Legal Resource Center (ILRC) to provide capacity building to their grantees.

⁶ CompassPoint originally held three-day convenings, but they shortened the trainings to two days because grantees had difficulty attending for three days.

⁷ Fundraising Academy for Communities of Color.

- **All of the organizations provided some individualized or tailored TA, it was sometimes challenging to get participants to fully take advantage of these opportunities.** Although respondents felt that more intensive training models have the potential to be more impactful, participants frequently did not have the resources or capacity to commit significant time to organizational change activities. For instance, NCDI was supposed to provide individualized TA to all seven of its cohort organizations, but ended up providing tailored assistance to only one due to challenges in timing. When approached to receive TA, the organizations were focused on “putting out fires” due to the economic climate. Similarly, the program coordinator from NFF notes that the current economy forces folks to do more with less, increasing the strain on organizational leaders who are forced to “wear multiple hats and are pulled in multiple directions” and this hindered the pace of progress in their more customized TA work. She explains:

Often it took so long to just get through engagements—waiting for information, having to reschedule meetings with leadership and board members—that by the time our engagements moved along there’d be some learning loss, or new financial circumstances would have arisen, or new financial reporting [to consider.]

- **TA organizations tried to connect participant organizations virtually or over the phone, but found that there was no substitute for in-person meetings.** For instance, in order to try to overcome the geographic challenges faced by participants in the San Joaquin Valley, in the second year, CP tried to do the peer leadership circles over the phone. CP’s program coordinator said that the peer learning circles that were conducted over the phone were “qualitatively different” and that it was easier for participants to disengage. Again, another unintended consequence and interesting lesson learned borne out of an effort to meet their needs and overcome certain challenges.
- **Ultimately, TA intermediaries worked to find the right menu and intensity of strategies so that they could meet organizations’ needs, while not overwhelming them.** NFF is a good example of an organization that adopted multiple strategies in order to deliver the right mix of TA support. In the first two years of the initiative, NFF provided “light touch” workshops on fiscal management to over 100 participants and more intensive tailored TA to eight organizations. For third year of CLP, NFF will continue to offer workshops but will also offer a two-day Financial Leadership Clinic in place of the individualized TA that had been offered in the first two years of the CLP initiative. NFF’s program coordinator notes that this is a more appropriate strategy that better suits the needs of the participating organizations while also giving them more opportunities to interact with their peers. Moreover, this solution strikes a balance between the two strategies they were employing before – providing a deeper engagement than the workshops but without requiring the deeper time commitments of the individual TA work. Similarly, CP has cut down its trainings from three to two days, because staff understand that it was a burden for program leaders to be away from their organization for so long. CP also goes

out its their way to make hotel reservations and handle other logistical tasks for participants, in order to make their participation as stress free as possible.

Emerging Findings on Promising Technical Assistance Approaches

The *approaches* that CLP TA intermediaries took to building capacity in low-income communities and communities of color are the key dimension that distinguishes the work of CLP TA intermediaries from that of other capacity building efforts.

In order to work effectively with small grassroots organizations and in under-resourced communities, TA intermediaries needed to adopt a culturally competent approach, which required that intermediaries be flexible and maintain a high degree of humility. All TA intermediary staff members that we spoke with felt that they had a kind of cultural competency consciousness embedded in their thinking as they moved forward with the CLP initiative. Almost all noted that even with this consciousness and having had years of experience working with diverse communities, there were aspects of working with these particular participants that were new and required some reflection and often, some shifting of content or TA delivery methods. Respondents noted the following as key elements of their approach to providing culturally competent TA.

- **Knowledge of and sensitivity to regional characteristics and culture is a very important dimension of effective TA.** This was a strong theme among those TA

CompassPoint's Multicultural Framework

CP's efforts to provide culturally competent TA to diverse organizations is rooted in the multicultural framework they use to approach their work. In CLP, as in all of their projects, CP challenges itself to bring to bear the ideals in their framework within their work, to ensure that they are "living out" their beliefs in their curriculum content, delivery, and interactions with others.

Intrinsic to this framework are four core beliefs¹:

- 1) Culture and difference are integral to society. Acknowledging this in an intentional way enables them to "respond to this reality most effectively."
- 2) Culture and differences are sources of strength. As such, they offer opportunities to learn and grow and can be sources of joy and celebration.
- 3) Culture and difference are linked to power and privilege. This results in unequal access to resources and opportunities and acknowledging this opens avenues to strive for justice, equity and power sharing.
- 4) Cultural change is impacted by power and privilege. Power and privilege also play a role in shaping and changing culture. Many people draw strength from their cultural heritage, often going against the strong current of cultural domination. This is balanced with the need to move and adapt to change in a cultural context that is dynamic and fluid.

intermediaries that served the San Joaquin Valley, but it was also true of other communities as well. The FIS project coordinator emphasized the importance of regional competency in their work, particularly in their work in the San Joaquin Valley. She said,

There is a culture in the San Joaquin Valley that is different...so it is a more multi-faceted and nuanced approach to cultural competency than what is traditionally thought of as being culturally competent.

In order to address this issue, FIS partnered with trainers “who really understood the region and the challenges that they faced as non-profits so that the learning could be really well received.” Similarly, the program coordinator from SVCN noted that there is a dearth of TA intermediaries that really understand the issues of the South Bay. She had brought in speakers from Oakland, only 45 minutes away and found that the content was not useful because the speakers lacked knowledge of the local community.

- **Culturally competent TA requires humility, self-reflection, and a willingness to learn.** The CP program coordinator said that how trainers “show up” is key and that there is a need to demonstrate “integrity, a willingness to learn, and humility.” The program coordinator from NFF stressed the importance of humility, saying that TA providers need to “walk into a situation” with the knowledge that they “probably do not appreciate the nuances of the politics around the table or the organizations within the community or the community itself.” Cultural competency requires that TA staff be open, ask questions, and respect clients’ “unique constraints.”
- **TA intermediaries seek out knowledgeable community experts in order to get feedback on the training materials and approach.** Both CP and FIS have worked hard to tailor the structure and content of TA to the community context, particularly in their work in the San Joaquin Valley. Recognizing that they do not have nuanced understandings of issues in the San Joaquin Valley, CP works closely with two regranting intermediaries (CRLA and ILRC) to ensure that the content of their trainings is relevant. In addition to asking for curriculum feedback from these two intermediaries, CP created an advisory committee made up of CRLA and ILRC grantees who offer input and feedback regarding training curriculum and approaches. Similarly, FIS employs a “culture of inquiry” as a “matter of practice.” A culture of inquiry is a process wherein the trainer checks in with the TA team and with participants, asking, “Are we still on track? Are the services and programs that we are providing and delivering still relevant? Are they still useful? Are they still appropriate, given who we are serving?” The culture of inquiry helps to ensure that TA providers are “very intentional about hearing from [your community], understanding them, and being sensitive in your programs’...needs.”
- **Flexibility emerged as one of the most important aspects of culturally competent TA.** CLP TA providers have had to be very adaptable, particularly when going into new communities or when working with new constituencies. For example, CP adapted their approach when they discovered that their peer coaching model was not working for everyone. CP’s model of peer coaching

involves a highly structured facilitation approach that is designed to help participants quickly and effectively “get to their own solutions” to identified goals or challenges. The program coordinator noted, “for those for whom it works, it *really* works,” but others found it difficult to engage. It was a particularly difficult process for organizations that were in a more nascent stage in the nonprofit lifecycle. Because there is not a one-size fits all approach that works for everyone, it is important to have alternatives for those for whom this kind of structure does not work. The leader of a Hmong organization, for example, felt uncomfortable with the peer coaching approach and preferred a workshop approach instead. CP, therefore, invited him to Bay Area workshops that were relevant to his needs and paid his travel costs.

- **TA intermediaries are attentive to cultural differences when designing and delivering TA.** The program coordinator at NCDI describes this as really thinking through issues of cultural differences up front and how they impact NCDI’s delivery, approach, and budget. Using the issue of translation as an example, it is important to set aside money for translation and to build in time to have the translation done.
- **Intermediaries are pushing participants to think about diversity as being more than race or skin color.** Diversity needs to include not just cultural or gender diversity but also ideological diversity. The program coordinator from FIS notes:

As a TA intermediary, I think it is important to understand that having the same color skin as the community of which you serve does not [constitute as] cultural competency..... Let’s not just leave diversity at the color-of-skin door. Let’s talk about a little bit more in-depth about what diversity is and how can and should be reflected in your board and your staff. It’s not just about cultural diversity or gender diversity, but strong boards have ideological diversity, they have socio-economic diversity. We’ve approached it through that lens which seems to be more palpable and not put people on the defense.

As suggested by the findings highlighted above, in addition to supporting participant organizations and leaders, the CLP TA strategy helped to enhance the capacity of the TA intermediaries. Particularly in the case of those TA providers that worked in the San Joaquin Valley, CLP pushed intermediaries to break out of their comfort zone and to create an infrastructure and the relationships necessary to provide TA support in areas that had previously unfamiliar. Although this sometimes resulted in a slow start, most respondents felt that the lessons they learned in the initial phase of CLP would serve as a foundation on which they would like to build moving forward. See the CLP 2011 Report Executive Summary for a summary of the cross-cutting themes, findings and recommendations.