

Translating Training to Culture Change: Two Case Studies

By Priscilla Hung & Steve Lew

MANY GROUPS HAVE THOUGHT that lack of training was what prevented them from being successful at fundraising, only to be disappointed when things didn't change after attending a training. We are all familiar with being inspired and motivated at a training, only to come back to the office and find that the changes we hope to make feel daunting and complex.

Training can be very useful, but translating training into shifting an organization's fundraising culture takes an ongoing commitment of time and leadership beyond the actual training session. To help us learn more about how organizations use training successfully, we interviewed two participants in the Fundraising Academy for Communities of Color, a California-based program coordinated jointly by CompassPoint Nonprofit Services and GIFT.

The Fundraising Academy conducts an application process accepting a cohort of 20 groups, who, over a six to eight-month period, receive group training, individual coaching, and cutting-edge written materials. The idea is to provide a comprehensive program to inspire organizational fundraising culture change. Now in its ninth year, we are eager to share some lessons learned from the over 130 groups we have worked with.

“Learning My Role as a Fundraising Leader”

The Center for the Pacific Asian Family (CPAF) started in 1978, becoming the first multilingual 24-hour hotline in the nation assisting Asian and Pacific Islander (API) survivors of domestic violence and sexual assault. Soon thereafter, they expanded to provide both emergency and transitional shelter—again, the first multilingual program in the nation to specifically serve the API community. In 2005, they continued to grow by ramping up their community education and violence prevention services.

After almost ten years at the helm, Executive Director Debra Suh went on a sabbatical awarded by the Durfee Foundation. She came back re-energized with a stronger focus on fundraising and the gift of more time, since her day-to-day

activities were distributed to other staff during her leave. In 2009, like many nonprofit leaders, Debra was trying to figure out how to respond to the economic recession and keep her organization thriving. “We are heavily government-funded and probably always will be,” explains Debra, “but we've always wanted to diversify. The urgency caused by the economic recession and upcoming cuts in government funding was a big motivator.”

Picking the Right Program

The call for applications to the first Los Angeles cohort of the Fundraising Academy for Communities of Color was timely given the backdrop of funding cuts. Debra says it specifically appealed to her because the commitment was spread out over time. “I've been to a lot of trainings, and I already had a lot of experience. I saw the all-day trainings as strategic thinking time outside the office. And I knew that since it was a long-term commitment, my organization would have a greater chance of breaking bad habits.”

Much of the fundraising capacity-building usually offered to nonprofits is transactional, often being narrowly focused, one-

Why a “Fundraising Academy for Communities of Color”?

We believe that organizations led by people of color and based in communities of color are more likely to improve their fundraising when they participate in capacity-building programs that address the connections between race, culture and philanthropy, including:

- the realities of who has money and who doesn't;
- assumptions around who gives money and who doesn't;
- power dynamics in talking about and asking for money; and
- fundraising strategies that draw on legacies and existing practices of giving in communities of color.

Addressing these realities, coupled with a firm belief in the wisdom and ability of communities of color to give and raise money, can provide an inspiring and relevant fundraising program that goes beyond sharing information and building skills. We are also proud that, over time, we have grown our pool of trainers and coaches so that they are all people of color.

Fundraising Academy participants receive:

- eight day-long group trainings with peer learning;
- evening training for board members;
- 15 hours of individualized coaching;
- two books, one on grassroots fundraising and one on nonprofit sustainability;
- year-long subscription to the *Journal*; and
- a long-term investment in their growth and development.

time events. Reasons for this include the common desire for quick fixes, funder interest and capacity, and widespread misinformation about what successful nonprofit fundraising looks like. Aside from “Fundraising 101” type programs, most other trainings, in Debra’s words, “try to hook you in with the next new thing that you can’t or don’t know how to really apply.”

Another concern about capacity-building programs that often does not get discussed is the approach of the trainers themselves. While CPAF, an organization based in the API community with an all API board and staff, was not necessarily looking for a program exclusively for communities of color and led by people of color, they did find that who delivers the training and how can make a big difference on how the information is received. “We attended a highly-regarded fundraising training that had essentially the same message and information as the Academy, but some of my board members shut down because they found some of the trainers’ comments offensive,” confides Debra. Other participants in the Academy echo similar thoughts, feeling that learning spaces are most effective when different cultural values are considered, people feel respected, and the information shared by the trainers resonates with the participants’ experiences.

The Importance of the Fundraising Plan

Similar to many other nonprofit organizations, CPAF was strong at grantwriting and enjoyed coordinating events, even if the events didn’t raise much money. Individual donor cultivation was the weakest and most confusing area. Prior to investing in long-term training, Debra describes her style of donor fundraising as “scattered.” She explains, “It’s hard for me to leave money on the table and say no to opportunities. Our staff and board are very

creative, and we were always trying the newest idea. We would be all over the place.”

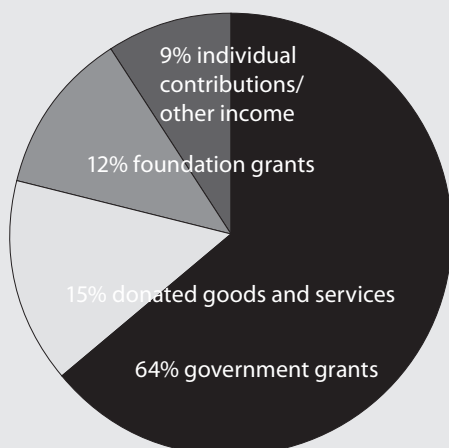
When asked for the most valuable outcome from her time spent in the Academy, Debra is quick to respond: “The fundraising plan. We could’ve paid a consultant to create our plan, but it makes all the difference to do it yourself. I learned how to do it so that I can sustain it year after year and tailor it to our needs.” The plan helped her understand the need to build on existing fundraising activities rather than start something new every year, as well as the consequences of spreading their resources thin. Now, when a new fundraising idea is brought to her, she asks how it fits into the fundraising plan. If it doesn’t fit, she no longer commits staff resources to it. “It was an amazing transformation for me personally,” says Debra.

Several components of the Fundraising Academy helped her implement and sustain this change, which could be easily replicated by other capacity-building programs. The training time helped her understand why and how to organize her organization’s fundraising efforts. A clear and simple template was provided for them to work from. “Homework” between training sessions motivated her to put the plan down on paper. Peer learning helped her get new ideas and avoid pitfalls. Coaches were instructed to not create the plan for participants, but instead to help them set realistic goals that would not set up the organization to fail. CPAF also had access to follow-up coaching, which they used to facilitate a board and staff retreat to incorporate their new approach to fundraising throughout the organization.

This process has helped Debra see the connections between strategic organizational planning, strategic fundraising, and strategic leadership. “Like strategic planning, the strength of an organization

Center for the Pacific Asian Family (CPAF) At-a-Glance

ANNUAL BUDGET: \$2.3 MILLION



CPAF exists to end family violence and violence against women in Asian and Pacific Islander communities. Their mission is to build healthy and safe communities by addressing root causes and immediate needs, while meeting the cultural and linguistic needs of API women and their families. They run a multilingual hotline, emergency and transitional shelters, children’s programs, and classes on topics such as non-violent parenting and child care, dating violence, and rape prevention. Last year alone, they provided services to over 2,000 women and children in Los Angeles, CA.

Annual gala: \$97,000
 Major donor campaign: \$30,000
 Direct mail campaign: \$5,000
 House parties: \$11,000

People power: 11 board members, 29 staff members, and 128 volunteers

is when you can point everyone in the same direction—fundraising included,” she says.

Sustaining Change

In addition to having a more focused approach to their donor fundraising, CPAF has continued to experience other benefits over the few years since the Academy: (1) a board of directors that is more strategic in and supportive of donor fundraising; (2) the launch of their first major donor campaign; and (3) greater diversification of revenue. To help implement these changes, they hired a Development Manager, a new position for CPAF.

They decided to focus on three main strategies for the board—the annual event, a major gift campaign, and their own giving. “We’ve been talking about doing a major donor campaign for a decade, but the Academy was the first time we were given all the tools in a clear way,” says Debra. One notable success is that the board decided to hold its first major donor campaign. In fact, the board was so excited to launch this campaign, Debra had to actually ask them to allow her to contact some prospective donors because they wanted to do all of the asks themselves.

Whereas government grants used to make up over 75% of CPAF’s overall revenue, that percentage is now down—not due to loss of funds (in fact, their budget has grown since 2009), but because income in other areas is up. Debra proudly states that board giving has increased, and the organization has more donors and has been able to raise more money from them. She also notes an increase in foundation grants received, which she partly attributes to being more visible in the community.

Debra has advice for other organizational leaders who want to diversify their funding: “Commit to it. Stay focused. Don’t procrastinate.”

“Rooting Our Fundraising in Our Community”

Evonne Gallardo came to Self Help Graphics & Art with a background in raising money for arts organizations. She had mostly worked at nonprofits that had robust corporate support and already had a base of individual supporters who were established as philanthropists, gave large gifts, and were mostly white. She found a different world at Self Help Graphics when she started as development director in 2001.

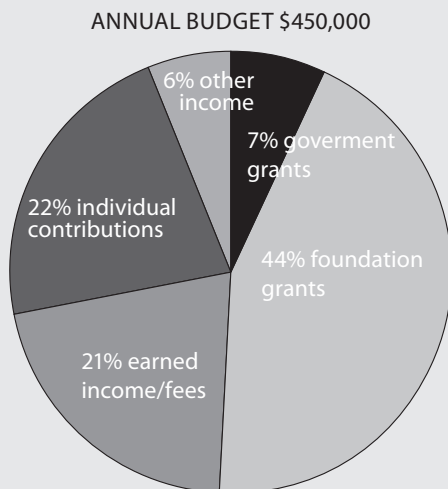
The traditional fundraising expertise she came with didn’t immediately connect. Donors to her previous organization largely gave out of charitable and philanthropic interests. Donors to Self Help Graphics gave because they had received a service or opportunity, bought something, or attended an event. Evonne found it to be much more entrepreneurial, with a lot of give and take with the community of local artists in East Los Angeles.

When she returned in 2009 as executive director, Evonne sought to incorporate both what she learned in her previous fundraising work as well as the assets and traditions brought by Self Help Graphic’s Latino community. Encouraged by President Obama’s grassroots-fueled campaign in 2008, she started by approaching their volunteers to make small gifts to the organization.

Bringing Together Two Approaches

To help bolster her goal of integrating traditional fundraising with

Self Help Graphics & Art At-a-Glance



Incorporated in 1973, Self Help Graphics & Art is the leading non-profit visual arts center serving Los Angeles and its majority Latino community. Self Help Graphics develops and nurtures Latino artists in printmaking, especially young and emerging artists. They also advance Latino art broadly through programming, exhibitions and outreach to diverse audiences in East Los Angeles and beyond, reaching 8,000 people per year.

Budget: \$450,000

Annual dinner: \$60,000

Direct mail campaign: \$5,000

House parties: \$6,000

Earned income: \$7,500

People Power: 13 board members, 3 staff members, and 30 volunteers

what she was learning from the Latino community, Evonne sought out training. She didn't find a fit with much of what was presented at Association for Fundraising Professionals meetings, thinking, "This is not going to work in our community, or we tried that and it didn't work."

She liked the smaller, multicultural setting offered by the Fundraising Academy for Communities of Color. The conversations she had with her peers at the Academy inspired her to dig deeper and think bigger and more creatively in her strategies. She also appreciated that the monthly trainings were dynamic and energetic, with several hands-on exercises and interactive discussions, rather than a static classroom approach. The Academy was particularly relevant to grassroots social justice organizations in a way that traditional fundraising trainings were not.

Conocimiento

Evonne quickly realized that the grassroots approach she wanted to use at Self Help Graphics was rooted in *conocimiento*—the desire to get to know you and for you to get to know me in order to move forward together. She knew that their programming, events, and fundraising appeals had to reflect the community in an authentic way that is only possible when you truly get to know each other.

Evonne describes why this shift in focus was necessary: "There's a difference between the Mexican Museums you can visit in different cities around the country and Self Help Graphics. Going to places like The Mexican Museum in San Francisco or the National Museum of Mexican Art in Chicago is like going to a fine restaurant. Going to Self Help Graphics is like being in your grandmother's kitchen."

Getting the Board on Board

A key step to bringing *conocimiento* to their fundraising was getting their organizational leaders on board. Since this approach is very much rooted in personal interaction, she needed her board members—who are also community leaders—to understand why this kind of fundraising is critical for Self Help Graphics in order for them to be willing to ask their personal contacts and networks for gifts.

One feature of the Fundraising Academy is an evening training specifically designed for board members to attend so they can be more in sync with what their staff is learning. People are encouraged to bring board members or staff as guests to the day-long training, but these evening trainings are usually more convenient. Four of Self Help Graphic's board members attended, and the head of the board fundraising committee reported back to the full board at their following meeting.

As a result, board members were able to articulate for themselves the importance of donor development, the importance of the board taking a leadership role in this work, and the various ways that they could participate in the fundraising process. Having a safe space for board members to learn, plus having the information presented by fellow board members, made it much less scary for them to get involved, reports Evonne.

This has produced tangible results for Self Help Graphics and has helped shift the board culture of fundraising. Prior to the Fundraising Academy, board members mostly focused their attention on grants. Now they pay much more attention to the individual contributions line in the budget, and have become more invested in donor development. Their level of participation has significantly increased, with 90% of the board making their own gifts as well as participating in fundraising activities, such as hosting house gatherings and inviting their friends to attend and donate.

This shift in focus for the board has also translated into an increase in Self Help Graphics' earned income. Board members now often help with the sales of art prints, which account for a majority of their earned income. As board involvement in fundraising has increased, so has their involvement in other revenue sources.

Building on Strengths

When Evonne applied to the Academy, she knew that Self Help Graphics had several weaknesses in their fundraising program. But she also knew that they brought many strengths, including a strong commitment to their mission and a legacy of community involvement and support.

This assessment helped her set clear goals for what she wanted out of the Academy that built on the organization's strengths. Ultimately, she wanted to launch a successful individual giving program, through which they would learn more personal, deep, and innovative ways of connecting with their constituency in order for community members to financially invest in the organization.

Her advice to other groups in a similar situation is to get clarity about what they want from training, how those goals connect to the culture of the organization, and what that will help them accomplish. ■

Priscilla Hung is a program director at Community Partners and the former executive director of GIFT. Steve Lew is senior project director at CompassPoint Nonprofit Services. The Fundraising Academy for Communities of Color is a joint program of GIFT and CompassPoint, with Community Partners serving as the local partner for the Los Angeles, CA program.