FIRST NATIONS DEVELOPMENT INSTITUTE

CALIFORNIA TRIBAL FUND

Insights for Investing in

CALIFORNIA TRIBAL COMMUNITIES:

A Rigorous Needs Assessment of Grantee Tribal Partners

ACKNOWLEDGEMENTS

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This publication is dedicated to Sabine Talaugon, former program officer of First Nations Development Institute's California Tribal Fund. Without Sabine's invaluable contributions, this report would not have been possible.

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INTRODUCTION

The overarching aim of this project was to conduct a relational-based, rigorous, and systematic community assessment with First Nations Development Institute's California Tribal Fund and grantee partners to better serve California Tribal communities through improved grantmaking.

This final report for the grantee partner needs assessment project is guided by the mission of California Tribal Fund:

> *To invest in the viability and visibility of California Tribal Nations and communities.*

Three initial goals helped shape the project:

1. Gather and summarize information in support of California Tribal Fund to improve capacity-building services. This included understanding technical assistance and other needs among grantee partners.
2. Improve accuracy of the representation of needs of communities supported through California Tribal Fund to meaningfully and accurately communicate with philanthropic and other institutions about the needs of California's Tribal communities.
3. Understand the effectiveness and perceptions of trust-based grantmaking.

Approach to Assessment

Consultant evaluators for this project worked in close collaboration with California Tribal Fund to ensure a rigorous and meaningful assessment. This partnership with California Tribal Fund and authentic engagement with grantee partners led to an informative, valid, and reliable assessment. The project was based on the ideals that the most meaningful impacts are made when diverse community perspectives and voices are valued, and contemporary and traditional Indigenous knowledges are incorporated into understanding the data.

A mixed-methods process was chosen as the best approach. Gathering quantitative and qualitative data allowed consultant evaluators to capture the range of voices and experiences using methods that met their needs. Consultant evaluators were diligent in uplifting the voices of participants and the value of equity throughout the project.

The project began with in-depth discussions between the consultant evaluators and California Tribal Fund. This ensured the goals of the project were clearly understood and agreed upon. Another early phase of the project involved reviewing existing California Tribal Fund administrative data and documentation. This occurred as both an orientation for the consultant evaluators and as a precursor to instrument design. Two guiding questions emerged from discussions between consultant evaluators and California Tribal Fund:

> ***Guiding Question #1:*** *What technical assistance can California Tribal Fund provide to empower grantees to continue to scale their programs and develop their capacity to seek funding?*

> ***Guiding Question #2:*** *How have California Tribal Fund funding mechanisms (RFP, trust, RFP/trust combined) contributed to the success, growth, launching, and initiation of grantee programs?*

All grantee partners were invited to participate in a survey and interview. Email invitations were sent to all California Tribal Fund grantee partners and included links for the 56-question survey and a scheduling mechanism to sign up for a 45-minute interview. Reminders about the survey and interview opportunities were sent via email and text messages. Accommodations were made for diverse ways of engaging with the survey, including distributing and receiving surveys in an alternative format. A raffle was facilitated as an incentive to participate in the assessment. Five participants among those who completed the survey, or met with evaluators for an interview, were randomly selected to receive an 8th Generation gift. Those who completed a survey and interview received two entries for the drawing.

FINDINGS IN ACTION: ADDRESSING LAND, WATER, FIRE, AND CLIMATE CHANGE

Throughout this project, access to ancestral land, as well as water, fire, and climate change, emerged as intersecting issues and themes identified through analysis of interview and survey data. Interviews helped illuminate complex processes for accessing ancestral land and water for purposes of gathering and growing food, fiber, and medicine, and other traditional reasons.

BACKGROUND

In recent years, the state of California has committed to expanding natural land access and return to California Tribes. Other recent events in California have unique effects on Tribes, including the removal of dams. Through the needs assessment, consultants learned of positive outcomes and difficulties related to managing the new initiatives. Some Tribes and Tribally-led nonprofits felt a sense of urgency or need to take advantage of these unprecedented opportunities. Related to this, and in combination with other opportunities, some grantee partners experienced or anticipated rapid growth and the need for additional staff. For some interviewees, the perceived pressure to take advantage of the new opportunities interfered with interviewees' ability to articulate their next best steps for reaching their mission, vision, or goals. To illustrate a positive outcome within a rapid growth context, one interviewee discussed that, as of four years ago, "this whole world was brand-new to us" and the Tribe had no stewardship programming. Yet, by the time of the interview for the needs assessment, the Tribe was entering into an intergovernmental agreement with support of a conservancy.

Non-federally recognized Tribes may see the California initiatives as an especially important opportunity. These "land back" processes fall outside the usual federal recognition and land-into-trust processes.

METHODS

Survey Design

The AmeriCorps Organizational Capacity Assessment Tool was used as a guiding document for the survey because it included a breadth of organizational capacity domains, without being overly burdensome. However, consultant evaluators made several key adaptations and additions. Items were modified to ensure that the final tool reflected the strengths-based approach of the project. An additional answer option was added to all questions to allow for respondents to provide more context, rather than having to fit into a particular item that may apply to them differently from how the question intended. Other publicly available organizational capacity assessment tools were reviewed for additional potential, unique contributions.

Interview Structure and Qualitative Data Analysis

Both consultant evaluators acted as co-interviewers for nearly all the interviews. Preparation for interviews involved learning about the organization, Tribal history, and/or programming and reviewing the grantee's survey data, when available.

Forty-five-minute time slots were offered to all California Tribal Fund grantee partners to balance the opportunity to be heard while respecting their valuable time. Consultant evaluators conducted semi-structured interviews and asked for permission to record interviews. About one-third of grantees went over the scheduled time, demonstrating their generosity and eagerness to share their knowledge, experiences, and situations.

Interview transcripts of recordings and interviewer notes not recorded were coded using an "inductive-deductive" thematic analysis method (Elm et al., 2019; Fereday & Muir-Cochrane, 2006) and qualitative software (Dedoose). Deductive coding involved identifying themes associated with visibility, relationships and engagement, and supports and infrastructure, which were key domains from the interview protocol. Simultaneously, inductive coding was used to identify additional emerging themes and explore the ranges of experiences and needs. Coding for themes and ranges coincided with a close listen to recorded interviews, which helped identify priorities as indicated by interviewees' voice tone and inflection.

PROCESSES FOR ACCESSING AND ACQUIRING ANCESTRAL LANDS

Narratives about increasing access to ancestral lands included descriptions of colonial processes. While sharing these stories, interviewees discussed facilitators, barriers and injustices, and cautionary tales associated with the "land back" process.

Some general challenges were discussed by interviewees who expressed challenges navigating the new "land back" opportunities, especially while maintaining their usual responsibilities. Some of the specific and more frequently mentioned challenges were understanding and accessing legal information and services. Others mentioned navigating real estate transactions and fundraising for purchasing land.

Among interviewees and survey respondents, co-stewardship, easements, and conservancies were commonly mentioned mechanisms for increasing access to land. Each of these types of mechanisms has different degrees of stipulations regarding land access, including deed restrictions, waivers of limited sovereignty, and others discussed below.

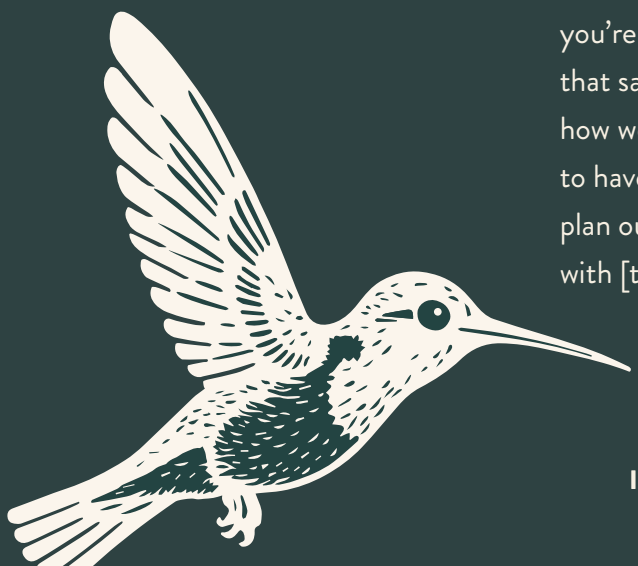
Co-Stewardship

Although not necessarily a mechanism for accessing land for purposes of food, fiber, or medicine, co-stewardship agreements appear to be "less new" and thus, a more common way that Tribes in California care for their ancestral land. Caretaking of land through co-stewardship agreements can help fulfill a traditional sense of responsibility, build relationships with other government entities, and generate economic development. One interviewee discussed his Tribe's difficulties developing a co-stewardship agreement with the federal government, yet they persisted with the process to work toward their goal of future land access and caretaking.

Easements

Cultural, reverse cultural, and conservation easements were mentioned by grantee partners. Among these, reverse cultural easements appear to be a novel arrangement discussed by an interviewee in context of a city proposing a cultural easement within a park. When the interviewee reviewed the proposals, he found:

"We didn't like either of those models of a cultural easement. … as we looked at the documents for the cultural easement, everything was, "You can't do this. You can't do that. You have to ask permission."… That's not the language that we want to live by. If you're giving this land back, it has to be in a language that says what we can do and how we can do it, and how we're going to work in partnerships. … We want to have access to this land to do what we want, to plan out how we are going to make it fire-resistant with [the city's] help."



The interviewee criticized cultural easements further by describing language in a proposed cultural easement agreement:

"'You could only go up to the top of this mountain. First, you have to let us know [a] certain amount of time before you come up there, you could only bring two cars up there, you could only have 30 people up there, and you can't plant unless you tell us what plants you're going to plant.' … So, it was like, you're not giving them anything right? You're creating all these rules about a sacred place."

Although most interviewees discussed easements as a form of continued colonial oppression, at least one interviewee from a non-federally recognized Tribe discussed the decision for a conservation easement as a good option for the Tribe:

"We took it under a conservation easement because, you know, that coincides and that's parallel to our cultural values … our vision statement. So, it worked out just beautifully."

Conservancies

Interviewees discussed working with land, wildlife, and ecological conservancies. Multiple interviewees discussed positive partnerships with conservancies, especially those that have similar values. In some instances, it was reported that conservancies can share common values on the surface, but during the relationship-building phase, it is discovered that the values were not as aligned with Tribal values as previously thought. Often, additional partners, such as counties, played a role in projects with conservancies. One interview discussed three conservancies involved in a single land-access initiative.

Cautionary Tales

Regarding the "land back" movement, interviewees with greater relative expertise in this area offered cautionary tales. Warnings included a lack of confidence in emerging partnerships and the potential for Tribal vulnerability due to uncertainty about where to turn for information and services related to land access and acquisition processes. There may be opportunists, such as attorneys, who may be disingenuous professionals with incentive to take advantage of Tribes during these "new land back" processes. All Tribes, federally and non-federally recognized, may be at risk or have vulnerabilities; however, risks may be heightened for non-federally recognized Tribes. Nevertheless, Tribes have long survived the effects of emerging threats and know what is best for them, including maximizing the potential of state opportunities.

WATER

Interviewees discussed their relationship with water access. Traditional foods, restoration, and rematriation were used to describe creek, river, and ocean access processes and intentions. When asked about land access experiences, interviewees included stories of the intersections between land and water access. One interviewee shared a story about a creek that runs through their homelands and related legal issues. Other grantee partners discussed the restoration of creeks within urban areas and lack of water access because of "big ag (agriculture)."

FIRE

Traditional burns and the intentional use of fire were mentioned by many grantee partners as being a part of revitalizing culture, uplifting prayers, and land stewardship engagement. Several interviewees mentioned traditional burns tied to cultural connectedness, and the use of traditional burns to bring safety to surrounding communities. Traditional burn programming was also mentioned by interviewees. At least one interviewee discussed the use of traditional burns to "burn back" invasive species. These invasive species can act as fuel for uncontrolled fires and displace original growth, which is connected to Indigenous well-being. Like the section about water, fire is further discussed in the "Climate Change" section.

PARTICIPANTS

Participants in this assessment were diverse, representing the wide range of California Tribal Fund grantee partners, including all portfolio areas (Food Sovereignty and Local Control of Food Systems, Culture, Access to Ancestral Lands, Youth, Fire and Drought, and COVID-19 Recovery and Resiliency Fund). Interviewees and respondents represented federally and non-federally recognized Tribes, Native-led nonprofits, gaming and non-gaming Tribes, and coastal, inland, rural, and urban geographies. Organizations ranged in size and length of time in operation.

A total of 39 California Tribal Fund grantee partners participated in the assessment (survey and/or interview), representing a 59% response rate. This high response rate met expectations (Anhang, 2022). Two respondents completed only an interview, 23 completed only a survey, and 12 completed both a survey and interview.

Survey Respondents

Thirty-seven California Tribal Fund grantee partners completed a survey. Survey respondents included 13 federally recognized Tribes, four non-federally recognized Tribes, 18 Native-led nonprofits, and two others (a Tribal school and one individual representing multiple types of organizations). Native-led nonprofit respondents ranged from urban Indian organizations and Tribal coalitions, to organizations closely tied to a single Tribe. Nine of the nonprofits represented in the survey were founded before 2000, seven were founded from 2000 to 2019, and four were founded after 2020.

Interviewees

Interviewees included elected and former Tribal leaders, administrative and program assistants, scientists, technical experts, board members, a director of an urban organization, a former presidential appointee, and at least one former federal employee. Consultant evaluators concluded that the range of interviewees strongly represented the portfolio of California Tribal Fund grantee partners.

Sixteen individuals participated in interviews representing 13 grantee partners, as some interviews involved two individuals from the same organization. Grantee partners were asked to complete the survey prior to their interview so that responses could inform interviews. In two instances, interviewees were unable to complete a survey prior to their interview. In at least four instances, the individual who was interviewed was different from the person who completed the survey.

CLIMATE CHANGE

Although not all dots can be connected in this brief, Indigenous worldviews instill that "everything is connected." The well-being of land, water, animals, and humans affect one another, and is essential for survival, including our cultures. One outcome of the disruption in the balance of our ecology is climate change. In California, climate change is seen through uncontrolled fires and drought, which can be complicated by normal weather patterns such as winds and El Ninos.

Along the lines of interconnectedness and effects of climate change, some interviewees explicitly mentioned this issue and others implicitly discussed these impacts. An example of implicit discussion and ties to the above, traditional burn programming was described by the interviewee as coinciding with restoration of pollinator habitats, which was a need resulting from neglectful land stewardship.

One positive change in recent years is the recognition by the state of California that traditional burns are a critical consideration for improving safety for everyone.

Another Tribal-level concern about climate change raised by interviewees is how even a slight warming of the ocean has created an imbalance in kelp, which helps filter the water. Sea urchins, abalone, sea otters, and fisheries are all affected by this change in the ocean ecology. Moreover, access to food was reduced and abalone reduction has cultural consequences.

ASSESSMENT FINDINGS

Visibility

Visibility was discussed extensively in interviews. Promoting visibility is critical for the survival of California's Indigenous peoples, as it counters the harm that can result from stereotypes, racism, and oppression, which get reinforced when invisibility is allowed to flourish. The importance of visibility is reflected in California Tribal Fund's guiding principles, especially:

> *Truth.*
>
> *We affirm our own stories and historical narratives as the truth.*

Details about what visibility looks like and means to grantee partners emerged through analysis of transcripts. One interviewee summed up the importance of visibility by stating:

> *"When it comes down to it, just recognition is our main goal."*

Being seen and heard in everyday situations and the general environment

Interviewees discussed the importance of individuals, Tribes, and communities being seen and heard in everyday situations and interactions. Interviewees highlighted how basic actions such as listening to the experiences and knowledge of California's Indigenous peoples advances awareness and understanding. Multiple interviewees discussed how the simple use of signage or public murals can be successful mechanisms for promoting visibility. One interviewee elaborated how nearby cities changed their "Welcome" signs to incorporate the traditional name of the aboriginal territory, which substantially increased visibility.

Need for presence in professional and governance situations

Interviewees discussed the need to show up as active participants in professional meetings involving non-Tribal institutions, including government-to-government interactions when nothing of particular importance is on the agenda. Interviewees were adamant that "having a seat at the table" is a necessary component of being seen and heard by government and nonprofit partners. Partner grantees lamented over the significant uncompensated time, energy, and staffing costs of these interactions, which are often discounted and burdensome.

Despite these challenges, Tribes continue to make these efforts because they can lead to positive outcomes. One interviewee shared that after a large fire, they asserted their traditional knowledge and – because of years of intentional efforts to show up as a partner – their involvement led to the identification of dozens of cultural sites that the government originally overlooked and the reassertion of their presence.

> *"There [were] only 15 cultural sites identified … when [the feds] went in and did the original trail work. And then, after the fire, our crews came in there and found 38 more. … I'm from that mountain. My people are from [location]. We have our village sites there. … My blood's in that ground."* — Interviewee

Challenges to visibility

A wide range of challenges were discussed by grantee partners related to their status as urban organizations, Native-led nonprofits, and federally and non-federally recognized Tribes. Nevertheless, there was common knowledge among the diverse group of interviewees that barriers to visibility generally originate from ignorance, including misunderstandings and lack of awareness about California's Indigenous peoples. Experiences of systematic erasure were discussed at the institutional level through bureaucratic methods. Other experiences involved one-on-one interactions, generally with government, business, or local nonprofit partners. Interviewees shared experiences about how partners' ignorance can interfere with the advancement of mission-driven work. An interviewee from a federally recognized Tribe described a situation at a federal partner meeting:

> *"... fundamental misunderstandings among non-Tribal folks [at the meeting] ... about what Tribal government is supposed to look like ... what Sovereignty is supposed to look like ..."* — Interviewee

This situation happened despite consistently showing up at the table with official authority to act on behalf of the Tribe. The interviewee went on to explain how assumptions about how Tribes should operate are an extension of ideas of "what a real Indian is supposed to look like," and has been a significant barrier to their work. These assumptions have practical implications for their work, hindering their ability to acquire and develop land.

> *"I wish [t]hat our delegation of authority could be respected. ... they just want to treat us as a conservation partner rather than in G-to-G (government-to-government) fashion ... no matter how many letters we provide [there is not recognition of the] decision-making authority. ..."* — Interviewee

For non-federally recognized Tribes, the process for becoming federally recognized is a struggle for visibility. This process is necessary for establishing a government-to-government relationship among Sovereign nations. Without federal recognition, non-federally recognized Tribes are forced to operate as nonprofit entities. Nonprofit grantee partners discussed other difficulties. One shared a story about the challenges with acquiring insurance as a nonprofit located on Tribal land. These barriers arose from ignorance among insurance providers.

Successful outcomes of visibility

Interviewees also shared positive experiences related to visibility. One grantee partner discussed the success of being incorporated into two local nonprofit partners' strategic plans, along with clear accountability mechanisms for how the nonprofit would report progress to the Tribe. This occurred without having to ask, and the interviewee considered this outcome as a sign of a successful, strongly built partnership over time. In this instance, it appears that the ingredients for success include having respectful nonprofit partners and persistent relationship-building efforts on behalf of the grantee partner.

Mission, Vision, and Strategy

Survey respondents have a clear understanding of their mission (78%, n=27), vision (68%, n=24), and how programmatic work will create the changes they are hoping to bring about (74%, n=26). Less than one-half of respondents reported having a strategic plan (40%, n=14) and two-thirds (n= 10) of those with a strategic plan indicated they are currently updating their strategic plan or had done so in 2024. Related to strategic planning, 28% of respondents (n=10) said their programs are driven in response to funding availability, rather than community needs. This data demonstrates a notable gap between grantee partners who have a strategic plan compared to those who do not, including those who report having clarity about how programs and services will lead to fulfillment of mission and vision. These contrasts within the survey data align with findings from the interview data that suggest that strategic planning assistance is a significant technical assistance need among grantee partners.

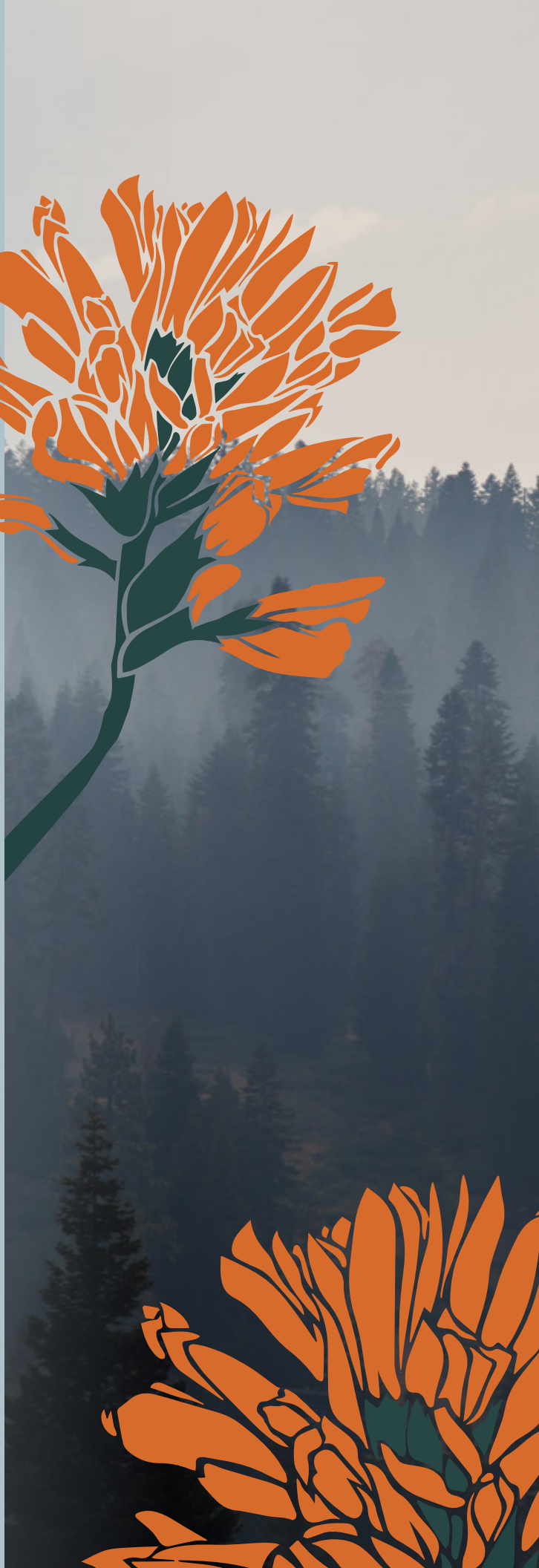
A strategic plan is a fundamental guide for any organization or Tribe to achieve their mission and vision. According to interviewees, barriers to strategic planning include rapid growth or change in governance, perceptions of increased opportunities, limited time, and staffing shortages — which are cross-cutting, intersecting challenges frequently discussed by interviewees.

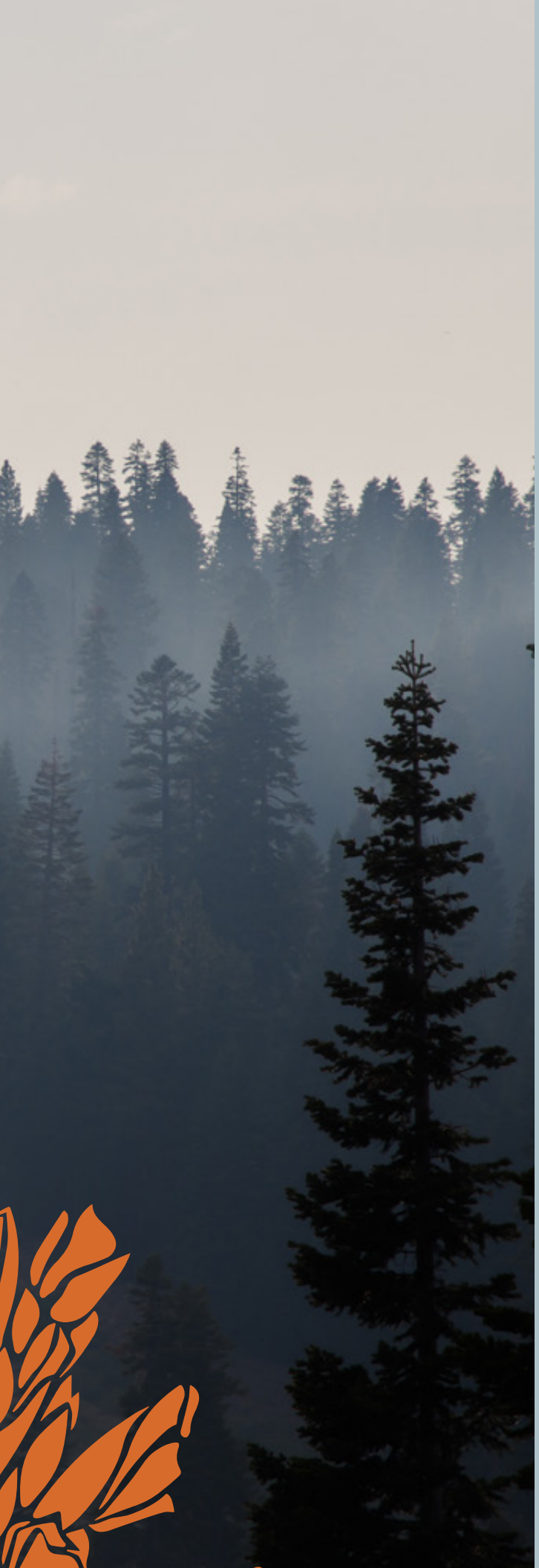
All interviewees expressed passion and dedication to achieving their goals, yet variation exists in their level of confidence in knowing their next steps toward success. Interviewees often mentioned other uncertainties that may be well addressed through a strategic-planning process.

One interviewee stated:

> *"I don't wanna do the wrong thing. I always wanna be on the right side of things, but also … I'm a big thinker. … How do I get there? So, I need to rewrite new goals. … What do I need to learn right now? What do I need to execute right now? … What do I need to become more familiar with so that I can … be successful for the people that I'm going to be helping. … I would really love some guidance."* — Interviewee

Another interviewee stated, "Sometimes we don't even know what technical support we need," signifying the challenges associated with navigating the intersections of rapid change, increase in funding opportunities, and limited resources.





Leadership

All survey respondents were asked about organizational leadership, which was defined as: "the highest-level staff in your organization, such as CEO, executive director, president, managing director, etc." All were asked separately about elected Tribal leadership. Additionally, nonprofits were specifically asked about the functioning of their governing board. It should be noted that participants included both organizational and Tribal leaders, and some represented both roles. Accordingly, some respondents self-assessed, while others shared perceptions of a leadership group of which they were not a part.

Overall, respondents reported the following perceptions about organizational leadership:

88% (n=29) initiate engagement with outside organizations

69% (n=23) have positive relationships with local, state, or federal agencies

70% (n=23) have the knowledge and skills to effectively lead and expand their work

66% (n=22) say their organization is known as a strong, collaborative partner

57% (n=19) believe that organizational leaders are comfortable negotiating with funders

66% (n=22) feel that their leadership has close connections to Tribal Council

Several respondents indicated that although they perceive organizational leadership as strong, training on effective leadership, organizational management, and board governance would be beneficial for those in leadership positions.

Overall, respondents reported the following perceptions about Tribal leadership:

51% (n=15) of respondents reported that Tribal leadership advocates for policy issues relevant to their work

58% (n=17) have positive relationships with relevant local, state, or federal agencies

48% (n=14) felt that their Tribal leadership saw cultivating outside relationships as a priority

Interviews provided additional insights into these survey findings. Interviewees indicated that Tribal advocacy was not exclusive to elected Tribal leaders. One interviewee discussed their role in acting on behalf of the Tribal government by way of Tribal government-granted authority.

All grantee partners are leaders. Some have a longer history of successful outcomes. Interview transcripts were examined to understand the nature of leadership in the context of success stories.

Two key indicators of strong leadership emerged from the narratives: 1) Ability to navigate systems while wearing many hats, and 2) Lengthy history of working within or alongside federal or local government. These abilities and experiences appear to influence the ease at which resources are acquired.

Nonprofit boards

The majority of nonprofit respondents (10) have a working board, and seven have a board that serves in a strictly governance function. Most felt that board members are knowledgeable and could effectively support the organization (n=15, 75%). However, individual respondents indicated that while the board is knowledgeable about the community being served and the programming and service delivery of the organization, they have little formal governance training. Twelve respondents indicated that board training would be useful.

Human Resources and Operations

More than one-half (61%, n=22) of survey respondents have a human resources (HR) policies and procedures manual; several additional respondents indicated they are working with an HR consultant to develop one. Only 50% (n=18) of respondents indicated that they regularly assess workloads to make sure they are manageable. Many respondents chose to provide additional comments, sharing that staff are often overwhelmed and do the best they can to juggle many different responsibilities; this sentiment was echoed by interviewees, as well. And 69% (n=25) have an organizational chart.

Some interviewees described tension between building their organizational structure, while also working diligently to expand high-quality programs and services.

> *"It is going really fast, and it's exciting. But it's also pushing us into a whole other level of operations that we've never had to do before. … [It's] challenging to simultaneously [b]uild these projects out, as well as building out our organizational structure."* — Interviewee

Several interviewees elaborated that these challenges were exacerbated by grant funding that cannot be spent on operational costs, as well as funding levels that change based on arbitrary grant cycles.

Staffing

Adequate staffing is a primary, cross-cutting barrier for assessment participants. Survey data showed that the median number of full-time staff is six. The median is presented here because a few large outliers significantly skewed the mean average. Organizations ranged from one to 250 full-time staff. Six survey respondents reported having no full-time staff. Most survey respondents have been in their positions for five to 10 years (n=15, 40%).

	Median	Minimum	Maximum	% Reporting this Staff Type
Number of full-time staff	6	1	250	84%
Number of part-time staff	3	1	25	68%
Number of recurring volunteers (i.e., regularly, repeatedly scheduled)	5	1	30	49%
Number of other staff	10	1	250	43%
Number of other staff	5	1	10	30%

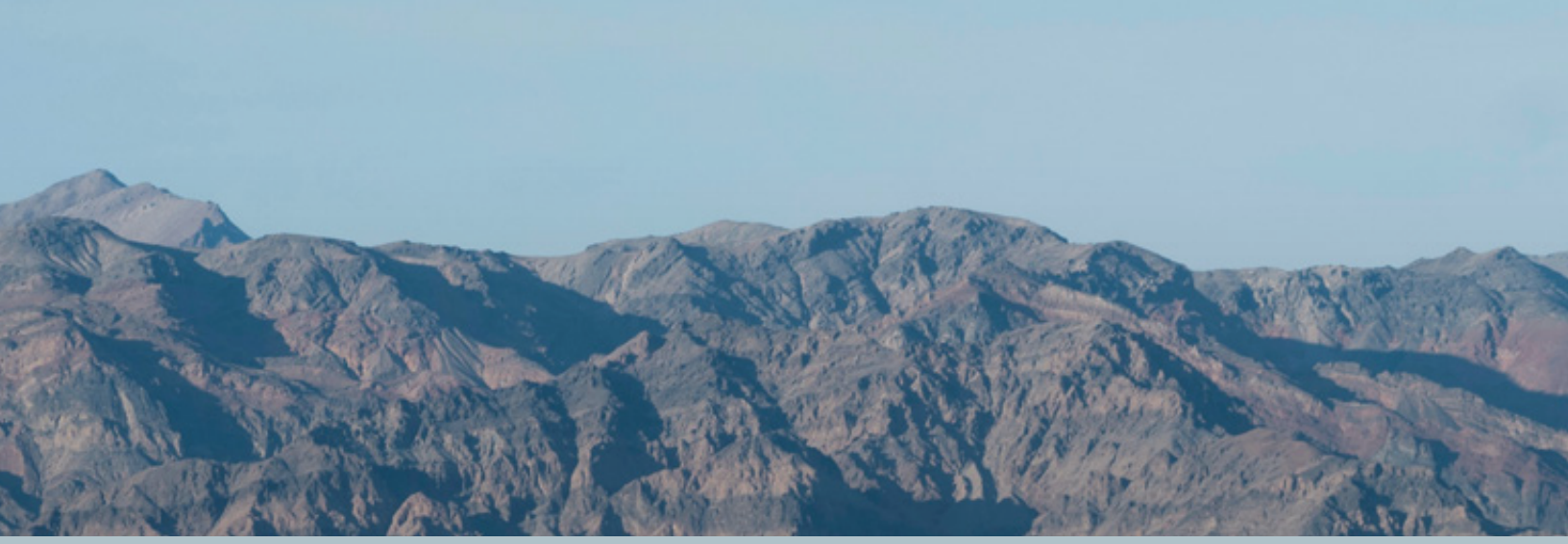
Employee recruitment, retention, and turnover

The ability to offer competitive pay and benefits appears to hinder recruitment and retention. Over one-half (58%, n=21) of respondents said they are unable to offer competitive salaries and benefits to attract employees. Respondents indicated that it takes an average of seven weeks to fill a vacant position. Two-thirds (67%, n=24) of respondents said they have difficulty attracting qualified job candidates within their geographic locations. One interviewee described housing their Tribal office 1.5 hours away from their reservation, closer to a population center; 39% (n=14) said they feel they lack time and capacity to invest in hiring; and 41% (n=15) feel that finding candidates who meet formal education requirements inhibits their ability to hire staff. Most respondents (91%, n=33) shared that their staff respect cultural values and integrate them into services. As one survey respondent elaborated, they emphasize cultural skill sets as a key factor in hiring:

> *"Our organization prioritizes hiring Tribal members or other local Natives; this is a small pool in a rural area. So, we generally do not have strict educational requirements. We recognize that cultural competency is a priority over academic background, and that those colonial skill sets can be taught on the job more easily than cultural skill sets."* – Interviewee

Retaining staff was identified as a primary challenge. Respondents estimated that on average, three staff left in 2023, which represents a 50% turnover rate for a median-size organization with six staff. For 2024, two-thirds (64%, n=21) of respondents anticipated a similar level of turnover, while one-third (33%, n=11) anticipated less turnover. Consistent funding was mentioned by interviewees as a key barrier to retention.

> *"It's been a choppy kind of rough year. We haven't really been able to keep consistent work for them just due to complications in contracting and getting agreements in place with government agencies is just not simple. … We did end up losing some staff, some of the stewardship crew … just have to feed their families."* — Interviewee



Despite these challenges, interviewees consistently shared stories of creativity to stretch resources:

> *"...we're severely strapped for resources. But we're also highly efficient, and we're getting a lot done for the amount of money that is being invested, and every dollar gets used."* — Interviewee

When discussing other areas of organization functioning (e.g., finance, HR, service delivery), staffing and retention were routinely working to sustain and expand work. Respondents often described investing time in training new staff, only to lose them to other organizations offering higher pay, better benefits, or more advancement opportunities; 50% (n=18) provide equitable compensation and regular pay increases to retain employees. Interviewees elaborated that stringent grant restrictions hinder retention efforts.

> *"People in the past who knew about [prior agreements made and Tribal culture] are no longer there, and things get lost in the shuffle."* — Interviewee

Opportunity for promotion

Opportunity for promotion is one reason that employees tend to remain with an employer. Close to one-half (44%, n=16) of respondents indicated that they offer equitable advancement and promotion opportunities. However, small organizations have limited opportunities for advancement, which likely hinders staff retention efforts:

> *"We are not large enough to have multiple positions for people to advance into."* — Survey Respondent

Aside from internal staff turnover, turnover at government agencies also negatively impacts grantee partners. Multiple interviewees spoke of delays or backward movement in progress of projects in situations when "champions" were no longer employed at federal agencies.

Training and Staff Supports

Staff training is crucial for sustaining a workforce. Just over one-half, (55%, n=20) of respondents indicated that they provide staff with regular training opportunities. However, when elaborating further, many indicated that employees are rarely able to attend training because of the burden of their regular workload.

When asked about their greatest technical assistance needs, interviewees frequently reported a need for training. Interviewees also frequently discussed the need for technical training for employees, such as GIS mapping. In at least two instances, interviewees mentioned that although they have the technical knowledge to be able to train other employees, they felt that delivery of training from an outside entity would be better received and would improve the learning experience of staff or council members.

Nearly two-thirds of survey respondents (63%, n=23) provide staff regular feedback and mentorship.

Workplace Culture

The majority of respondents indicated they have a supportive and inclusive workplace culture (83%, n=30) and that they could share ideas with leadership without fear of retaliation (83%, n=30).

Worksite Setup and Structure

The worksite setup and structure vary widely, with 39% (n=14) of respondents working fully in person; 20% (n=7) are flexible depending on individual preference; and 17% (n=6) vary based on the type of work being done (e.g., farming/gardening done in person, but office work done remotely). Over three-quarters of respondents (78%) said their organization can offer a flexible work schedule to employees.

Less than one out of 10 survey respondents (8%, n=3) is fully remote; and five entities do not have permanent office space. Many other entities described creative ways they have used their office space for programs and service delivery, including as a temporary chicken coup.

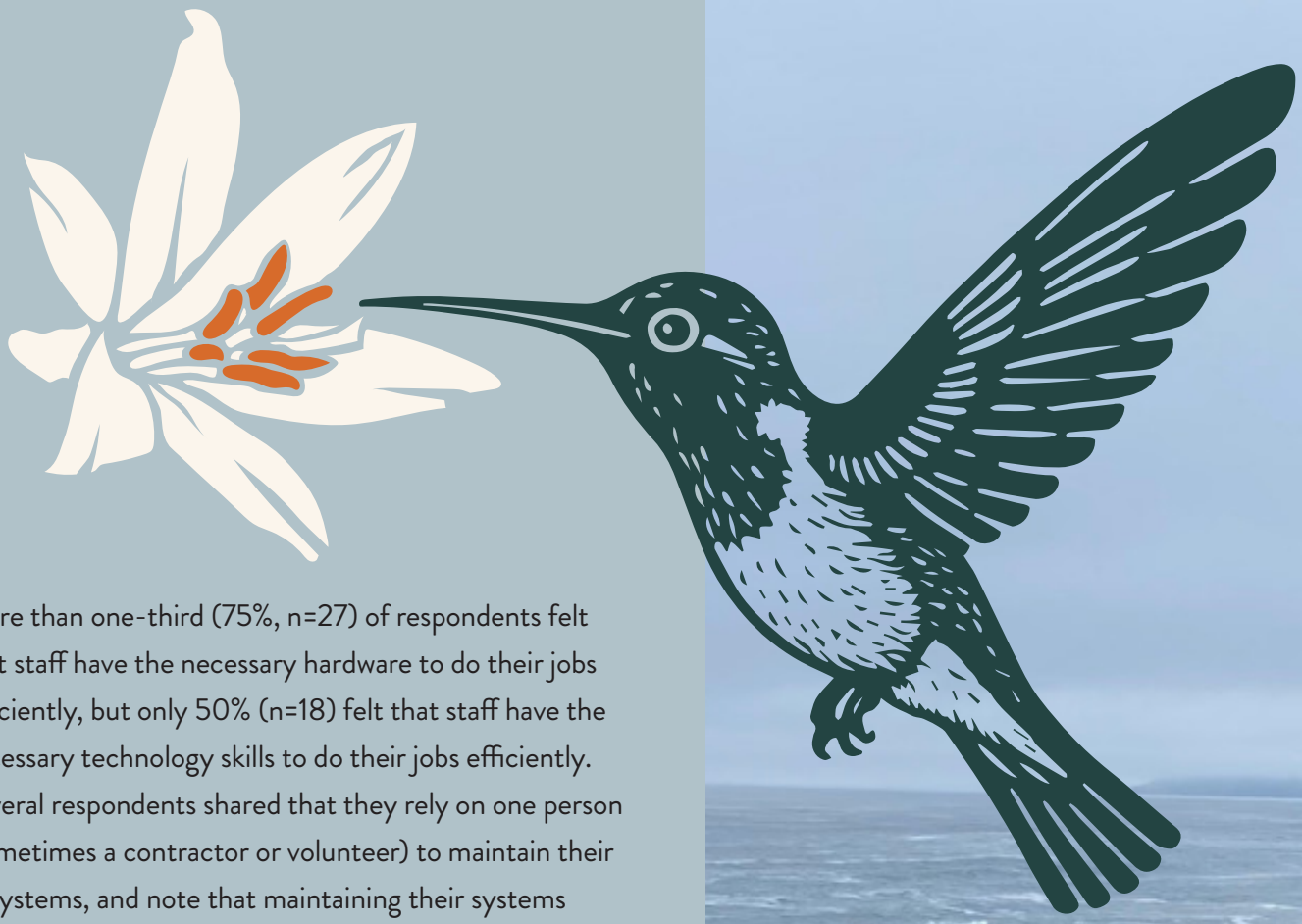
Twenty entities rent or own their office space. One interviewee shared that their Tribal administration is working toward establishing a permanent office space:

> *"There are property hazards with the ranch house that we want to convert to an office. [It's] like a 60-, 70-year-old, maybe an 80-year-old office or a house that we want to convert, and they suggested new wiring and new infrastructure in the house."* — Interviewee

Information Technology

Four (11%) survey respondents indicated a lack of reliable access to Wi-Fi, and 23 respondents (65%) indicated that they have reliable access to cell service. Variations in cell phone and Wi-Fi coverage at office and home locations were indicated, making remote work impossible for some. Several indicated use of Starlink satellite internet, and one reported that radio communication is necessary. Regarding Wi-Fi access, one interviewee shared about their capacity-building process that was supported by California Tribal Fund:

> *"We had the COVID-19 grant that [from California Tribal Fund] … I started learning. … And then we applied for others … so that really built our capacity. … Now we have some technology on our side in terms of Wi-Fi! We can actually have our type of Zoom calls now from the ranch and use that as our headquarters from now on, as opposed to what we've been doing — working from home and remotely."* — Interviewee



More than one-third (75%, n=27) of respondents felt that staff have the necessary hardware to do their jobs efficiently, but only 50% (n=18) felt that staff have the necessary technology skills to do their jobs efficiently. Several respondents shared that they rely on one person (sometimes a contractor or volunteer) to maintain their IT systems, and note that maintaining their systems without that individual would be difficult. Nearly one-half (44%, n=16) back up important data regularly.

Communications and Marketing

Three quarters (74%, n=25) of respondents have an active social media presence, 56% (n=19) can create tailored educational materials for a variety of different audiences, and 50% (n=17) felt their website accurately reflects the quality of their organization. Several respondents provided additional comments, noting that updating their website is a time-consuming process that falls to the wayside when staff get overburdened. What's more, 20% (n=7) of respondents indicated they have a communications manual or branding/style guide. Relatedly, video, marketing and promotional support was the most frequently cited type of technical assistance need among respondents (61%, n=19).

Program and Service Delivery

Overwhelmingly, respondents indicated they have strong skills in community engagement and dedicate significant time to this task as a priority (75%, n=27). At the same time, some respondents reported that they are eager to work more closely with the community. Similarly, 75% (n=27) of respondents indicated they are aware of the best practices of others in similar fields. More than one-half (61%, n=22) said they can respond to a community need when it arises; yet some elaborated that limited staff capacity and funding dampen their ability to be responsive to community needs.

> ***"While our staff has some of the expertise, (we) do not always have the capacity or funding to address immediate issues in our community."*** — Survey Respondent

Respondents reported that staff turnover hinders program implementation and service delivery.

When presented with an open-ended survey about greatest needs in the context of expanding their programs, many different types of supports were reported (table below).

Type of Support Needed	Total Mentions
Ongoing Funding	10
Indirect Costs	3
More Staff	15
Staff Retention	6
Physical Building	5
Community Engagement	5
Other (Specific Supplies or Programmatic Needs)	8

One respondent summed up the overall sentiment of respondents:

> ***"Permanent space, more staff, consistent funding."*** — Survey Respondent

Program Evaluation and Data Collection

Most organizations indicated a good understanding of the community they serve, including their needs (85%, n=29). Over one-half (58%, n=20) indicated having the ability to collect baseline data, and 64% (n=22) reported also having a relationship with an external organization to support data collection when needed. Over one-half (54%, n=18) use internal evaluation data to make strategic decisions, and more than one-third (35%, n=12) have used a dedicated evaluator to evaluate their programs. On the other hand, evaluation was among the most frequently cited areas of technical assistance that could be useful (61%, n=19).

Funding

Respondents were asked about the history of acquiring funding and types of funding mechanisms awarded. Additionally, they were asked which two types of funding mechanisms make up most of their budget. The most common responses were federal grants (n=13) and private foundation grants, not inclusive of California Tribal Fund awards (n=18). When asked what their ideal funding mix would be (open-ended question), most write-in responses reflected the following:

> ***"I think the best mix would be all of it: federal, state, foundation, donation, and fee-for-service."*** — Survey Respondent

Type of Funding Mechanism Ever Received	n	%
Private Foundation Grant (not California Tribal Fund)	31	86%
State Grant	27	75%
Individual Donors	26	72%
Federal Grant	22	61%
Revenue Generated from Program Delivery	22	61%
Local Government Grant	17	47%
Sponsorships	13	36%
Revenue Provided by Tribal Business	10	28%

Notably, several interviewees and survey respondents expressed uncertainty about how to seek advice on this topic. Analysis of transcripts revealed a tension between having a need for larger grants and having limited capacity to compete for them. Some interviewees expressed feeling "stuck" or not knowing how to strategically identify grants that would allow them to grow their work at a manageable and sustainable pace. Interviewees pointed to California Tribal Fund as a successful model, in which their grant funding increased year over year, allowing them to manage the growth of their award alongside programmatic growth. The need for consistent or long-term funding that can be relied on year after year was mentioned frequently and was identified as the greatest need for program expansion. One interviewee elaborated on the benefits of this type of support:

> *"... general operating grants untie your hands and allow you to dream."*
> — Interviewee

More than one-half (56%, n=19) of survey respondents had up-to-date fiscal policy and procedures manuals and felt they could readily manage a new, large influx of funding (58%, n=20). About one-third (38%, n=13) of respondents said they would have to shut down or dramatically reduce services if they lost one to two key funders; and 30% (n=10) felt they have sufficient discretionary funds. However, one grantee elaborated as follows:

> ***"No matter what, we are not going anywhere, at times like now we have no funding … we are still here. Whether that is liking a [social media] post, sharing achievements of our community members, information on a topic even if we don't have funding. … So, no we will not completely shut down because we have no money. We will just continue to volunteer and do the best that we can."*** — Survey Respondent

Interviewees elaborated on challenges with managing and applying for grants given limited staff time and capacity. They described challenges working on grants that restrict what funds can be used for, noting that paying for items necessary for cultural programs can be particularly tricky to fund. Several indicated that California Tribal Fund dollars are able to fill this gap and expressed appreciation for the flexible nature of the funding. Other major challenges identified by interviewees included managing grant reporting and tracking staff time across multiple grants. One interviewee described a promising model where the CEO salary is funded for three years, which provided a runway to get their organization off the ground. Also of note, several interviewees described funding from service delivery and Tribal revenue, and could offer a model for others looking to improve sustainability of their funding.

Technical Assistance

Through both the survey and interviews, grantee partners candidly shared a great deal about what types of technical assistance would be of use to them and about their experiences receiving technical assistance. Of note, many grantee partners expressed a desire to share their knowledge and expertise with others. Some described wanting to be known as a place of learning for others.

Process

Interviewees shared how the initiation or implementation of technical assistance support could be most useful to them. Grantee partners expressed that technical assistance is most useful when it is packaged with a meaningful relationship. Key elements of positive technical assistance processes include:

- Providers who understand their Tribal context. Having to provide this education takes overburdened staff away from programmatic work.
- Providers who are responsive and reliable.
- Providers who respect that Tribal staff are busy.
- Providers who can provide information/services without unnecessary back-and-forth or imposing restrictions on what is provided.

More than one partner grantee shared that asking for additional support in the form of technical assistance after having received a funding award was not culturally comfortable:

> ***"I will greatly take the $5,000 and say, 'Thank you.' But I'm not going to reach out and say, 'What else do you have in your pocket?' And I think most California Indian people are not going to do that. They're not gonna … we're just not going to do that."***
> — Interviewee

Type of Support Needed	Number of Mentions
Training	22
Video, Marketing, or Promotional Support	19
Evaluation	19
Resource Management Plan	18
Website Design	17
Strategic Planning	16
Accounting Support	15
Special Project/Event Support	15
Legal Support	14
Board Development	12
Cultural Site Surveys	12

Survey respondents were provided with types of technical assistance that California Tribal Fund has provided in the past and asked if these services would be useful for their organization. The most common reported needs were training (n=22); video, marketing, or promotional support (n=19); and evaluation (n=19). Grant writing was mentioned multiple times in the survey write-in fields.

Based on responses to survey items that were not asked about in the technical assistance portion of the survey, the following areas appear to be additional types of supports that would be useful for grantee partners:

- Strategic planning (60%)
- Support developing a communications manual (branding/style guide) (80%)
- Support developing a fiscal policy and procedures manual (45%)
- Support developing a human resource policies and procedures manual (39%)
- Training for general technology skill development (50%)

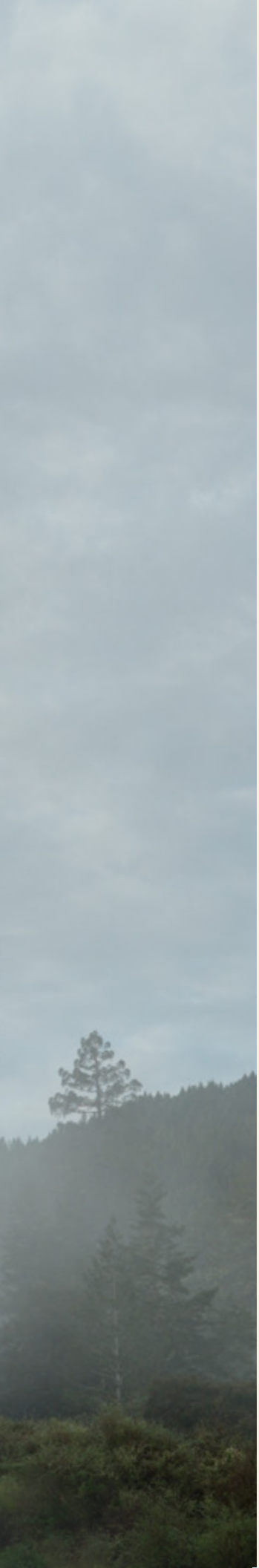
Access to Land

All survey respondents were asked about their organization's legal land status and given an opportunity to provide additional comments on their experience of accessing land for cultural purposes. Fifteen respondents reported owning land. Eleven respondents access land in trust, seven respondents rent land, and 13 respondents access land through partnership. Fifteen selected "other" as their legal arrangement, further emphasizing the uniqueness of each grantee partner. These included co-stewardship agreements, other types of relationships with their Tribe, public lands. (Total numbers exceed the number of survey respondents, as respondents could select more than one option.) Many interviewees discussed partnerships with conservancies and expressed a wide range of opinions about their experiences.

It is possible that some assessment participants may feel conflicted about strictly sticking to their existing strategic plan because of the unique sociopolitical climate. They may feel the need to seize momentum when opportunities present themselves. For example, interviewees expressed a need to respond to growing momentum for the "land back" movement in California, even if they didn't feel fully ready to take on large land parcels or fully agree to the terms of the transfer.

LIMITATIONS

Although this report is based on a rigorous methodology, there are some limitations based on the survey design and data available for analysis. The survey included a limited technical assistance checklist, which inadvertently excluded grant writing. Some partner grantees were unable to participate because of illness. As indicated in the "Leadership" section, individuals wear many hats and have various perspectives from which they can speak, carrying a risk of clouding the data. There is always a risk for bias, and controls for bias were incorporated into the project while developing survey items and conducting data analysis.



RECOMMENDATIONS FOR PHILANTHROPY

The following suggestions were developed for funders who work with California Tribal communities to help build and maintain meaningful relationships with Tribal grantee partners.

Trust, Respect, and Transparency. Trust, respect, and transparency go hand in hand and can form the foundation for a meaningful relationship with California Tribal Fund grantee partners. Understand that because of traumatic histories, trust takes time to build and needs to be earned. Transparent communication, and awareness and education about the diversity among the Indigenous peoples of California, can demonstrate respect and is essential for trust-building. Through iterative processes involving trust, respect, and transparency, a foundation for a sustained relationship will be built and reinforced.

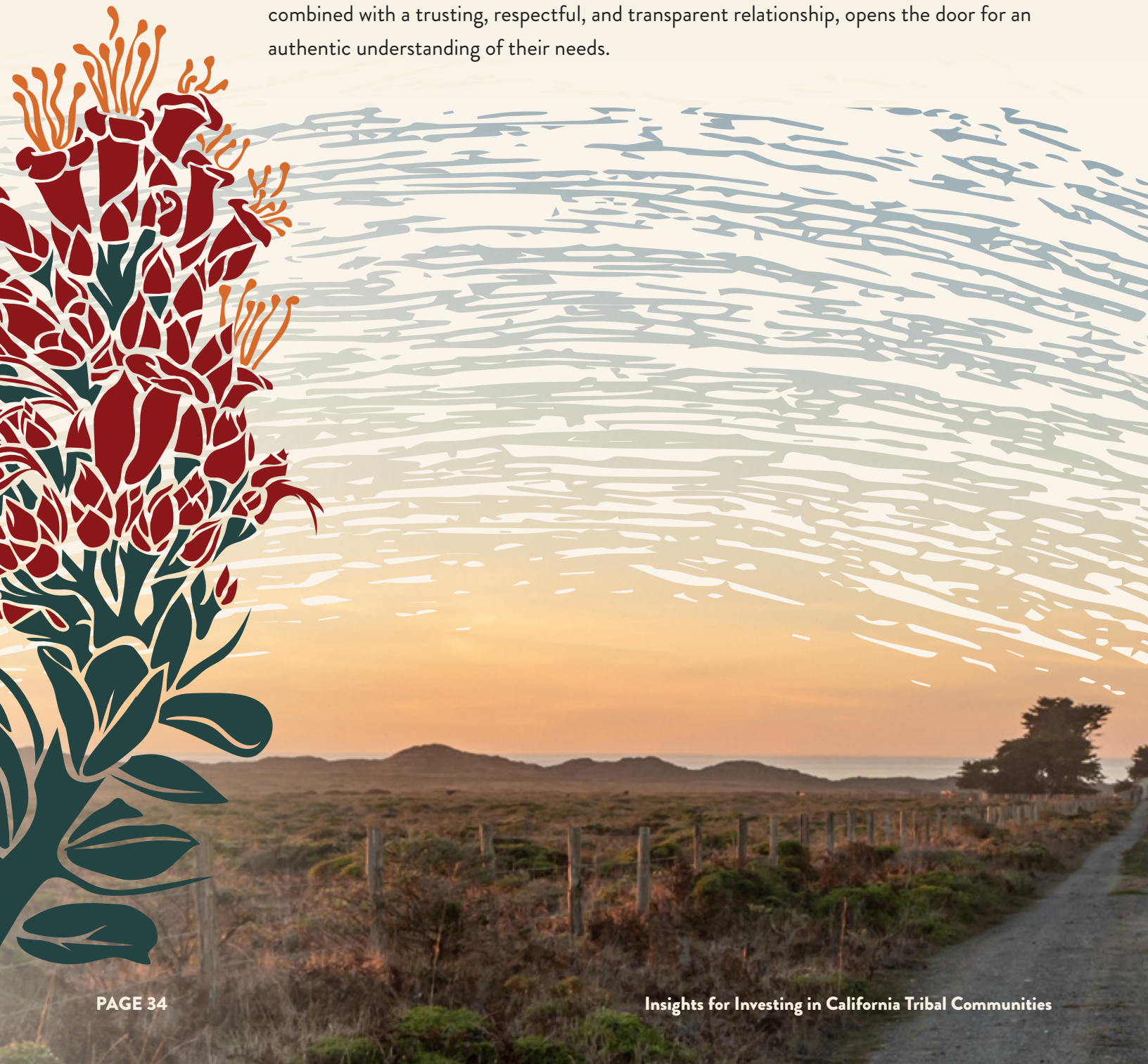
Education. Each Tribe is unique in culture, history, and governance structure. Understanding the diversity across California Tribal communities is a stepping stone for more advanced learning. For meaningful engagement with Tribal grantee partners, it is necessary to gain knowledge about each specific partner. It is important to consider, among other factors, each history, culture, geography, and status as a federally recognized Tribe, non-federally recognized Tribe, or Native-led nonprofit, which can influence engagement. Plan to absorb new knowledge or awareness with each interaction involving a Tribal grantee partner.

Humility. Approach engagement with humility and engage when invited. Understand that California's Indigenous peoples have traditional and contemporary knowledge that may be new to you. When invited to a community event, try to attend, even if simply to share a meal. While there, listen more than talk. Having humility will improve one's knowledge while bolstering a relational foundation of trust and respect.

Flexibility in funding. Through authentic engagement with Tribal grantee partners, one comes to appreciate their everyday experiences. Grantee partners continually navigate low-resourced situations and regular battles involving discrimination and oppression. Even so, grantee partners demonstrate leadership and commitment to positive impact through time and effort. Through these realizations, one comes to understand that the best way to support Tribal grantee partners is through flexible funding.

Provide holistic support. Consider how to improve technical assistance by adopting a holistic supportive approach. Conceptualizing technical assistance as a broad concept and using out-of-the-box thinking can lead to delivery of technical assistance that meets needs as defined by grantee partners. Remember that for Tribal grantee partners, establishing systems, structures, and facilities is quite burdensome and that support for operations may be the most pressing need at any given time.

Having an appreciation of the everyday, lived experiences of Tribal grantee partners, combined with a trusting, respectful, and transparent relationship, opens the door for an authentic understanding of their needs.



SUMMARY

This report provides an overview of the needs and experiences of partner grantees, while providing some nuanced details, cross-cutting themes, and insights into what can advance success and mission-driven work. Overall, participants shared struggles related to the intersection of lack of staff, time, and other resources, often in context of their perceptions of increased opportunities. This situation seemed to put several organizations or Tribes in a bind of uncertainty. Nevertheless, throughout the assessment process, participants expressed commitment to their communities, while exemplifying traditional values and firm principles. Generosity, healing, initiative, perseverance, resourcefulness, self-sufficiency, caretaking, and responsibility are among the key descriptors of grantee partners derived from a close review of their narratives, and of their everyday actions and groundbreaking endeavors.

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