Global Fund for Community Foundations

Case Study

Cherokee Preservation Foundation

Introduction

This Case Study, published by Global Fund for Community Foundations, is one in an occasional series highlighting community foundations that have been formed with substantial revenue from corporate investors to explore how communities harness these assets for the greatest collective good. Data for this study was compiled through interviews with Susan Jenkins, former executive director of Cherokee Preservation Foundation, video interviews with stakeholders, and the foundation's website and publications.

Cherokee Preservation Foundation at a Glance

Community:	Eastern Band of Cherokee Indians
Region:	Qualla Boundary, western North Carolina, U.S.
Mission:	To preserve our native culture, protect and enhance our natural environment, and create appropriate and diverse economic opportunities in order to improve the quality of life for the Eastern Band of Cherokee Indians (EBCI) and our neighbors in western North Carolina.
Corporate Funding Entity:	Harrah's Cherokee Casino and Hotel
First Year of Operations:	2002
Grantmaking:	832 grants totaling $66.4 million as of 2014; 61% of all grants went to EBCI institutions/projects; 39% went to regional collaborations; every $1.00 of CPF funding leveraged by $1.50 in outside funding/in-kind support

History and Governance

The Cherokee Preservation Foundation (CPF) was created through a Tribal-State Compact in 2000 with revenue from Harrah's Casino and Hotel, which opened in 1997. Then Governor James Hunt of North Carolina and tribal leaders recognized that the casino could generate significant revenue for the tribe but could also have a negative impact on traditional Cherokee culture and community cohesion. They decided that a community foundation model, requiring that gaming revenue be invested through grants for community projects to community organizations and non-profits, would create the greatest long-term benefit for the tribe and those living in a seven-county area where there is tribal land.

The Compact established a governance structure that ensures that both the tribal community and North Carolina state representatives have input in decision making and strategic direction. At present, the twelve-member board is appointed by the governor and is comprised of seven enrolled members of the EBCI, the tribal chief, another tribal government representative, and three outside representatives (including one from the county commissioner's office.) The board chair is usually a non-tribal member. All board members vote and serve four-year terms, and members can be reappointed on a case-by-case basis.

The founders recognized the need for technical expertise to direct the new foundation, but because at that time there were few registered non-profits on the Qualla Boundary and no other local foundations, few community members possessed the necessary leadership experience. Susan Jenkins, an enrolled member of the Choctaw Nation, was hired as the first executive director in 2001. A former program officer for the W.K. Kellogg Foundation and the Hitachi Foundation, Susan had previously worked in the Mississippi

Delta and West Africa and brought deep knowledge and experience in philanthropy and community development. Recognizing the importance of strong community leadership, Susan devoted time early in her tenure to helping the board build skills and to hiring and training a team of professional program officers from the tribal community.

Grantmaking Approach

In 2002 CPF began making grants in three areas: cultural preservation, environmental preservation, and economic development. It was essential to start making grants as soon as possible to show the community that CPF was an active and trustworthy steward of funds. In the beginning, CPF used a 'transactional' approach: soliciting proposals and giving financial assistance, which is the traditional method for most foundations.

However, several factors complicated the efforts to make grants. In addition to a lack of experienced non-profits to fund, the lack of a philanthropic culture and the community's sense that it was entitled to money held in trust by the CPF jeopardized the success of the investments. The CPF team realized it would need to help people understand the value of strategic investments to revitalize Cherokee culture and ensure the well-being of the entire community. To do this, it would also need to help build leaders and an ecosystem of community organizations to help bring about significant, systems-level change and create long-term benefit.

The CPF team developed a 'transformational' grantmaking approach that is characterized by three components: new skills and tools for grantees that apply to the individual, organizational, and community levels; convenings that bring people together and create a culture where continuous learning is desired and expected; and solid partnerships among groups on the Qualla Boundary, in the region, and at the national level so groups can share a wide variety of resources and ideas. Drawing upon the metaphor of traditional Cherokee basket weaving, the CPF team designed a four phase grantmaking process:

1. Preparation and groundwork – the team gives ample time and support to help grantees train project leaders, plan projects, and communicate with project stakeholders
2. Grantee progress – the team provides guidance to grantees but also freedom to experiment in all phases of the project. The CPF team's role is to help solve problems, not simply judge project success, so they work with grantees to find solutions when complications arise.
3. Institutionalizing learning – all grant proposals and budgets must include a work plan for program activities and a work plan for organizational capacity building. CPF will pay for professional development, and it even co-founded a regional funder's network that provides low-cost organizational training to non-profits. Grantees are expected to incorporate new skills and learning in their operations and exchange knowledge through participation in networks, collaborations, etc.
4. Beneficial results – CPF funding is intended to produce tangible results that both reinforce Cherokee culture and provide new benefits for the community.

This process helps CPF develop trust with grantees, whom CPF will often fund over several grantmaking cycles, and demonstrates how strategic grantmaking is more effective than payments to individuals for supporting well-being for the entire community. Through long-term partnerships, CPF and the grantee organizations see more substantial results – more effective skill-building and organizational development, better outcomes for program beneficiaries, and more creative ideas for future projects.

Programs and Results

Half of CPF's grants go to cultural preservation initiatives, one of which is Du-yu dv-I, (or The Right Path) a twelve-month program that combines leadership training for adults with cultural education 'to produce Cherokee leaders who understand and lead from their cultural roots,' according to program manager Juanita Wilson. The curriculum includes Cherokee language instruction, visits to sacred sites, and field trips to identify native plants. Developing the program required a big effort from the community, including focus groups, conversations with elders, and other feedback to understand what kinds of leaders the community wants. CPF provided financing, guidance, and tools for these activities, but the grantee led the project. As Juanita described, 'They (CPF) understand that it has to come from the community itself. (They are) just hands-on enough to help us get a foothold, create a foundation of our own and build on top of it.' Twenty participants have completed the program, which now has a full-time director and facilities at the Western Carolina Unversity's Cherokee Center housed on the Qualla Boundary.

CPF has also invested in a ten-year Cherokee language revitalization plan to increase the number of Cherokee speakers and restore the language as the foundation of Cherokee culture and identity. The ambitious plan calls for a total language immersion program for children, a post-secondary degree program for Cherokee language teachers, and a community-based second language program for children and adults, among other initiatives. A 2010 mid-term assessment funded by CPF highlighted impressive successes from grantee partners who have acquired classroom space, technical assistance, and equipment; trained highly qualified and committed teachers and program staff; and gained support from community stakeholders.[1] Cherokee is being integrated into people's everyday lives, and students are proud of their language and use it with each other.[2]

The assessment also explored on-going challenges and recommendations for achieving the plan's goals. Above all is the sheer amount of effort required to create language learning programs from scratch for various age groups. Finding and training teachers, designing programs for adult second-language learners, and measuring fluency are all complex activities that are being undertaken for the first time in Cherokee. Recommendations include strengthening the shared vision, planning, and coordination among partners, as well as increasing capacity.

Another focus area is environmental preservation, which accounts for 20% of CPF grantmaking. A cornerstone of that investment is Generations Qualla, an action plan for conservation and renewable energy projects based on traditional Cherokee values.

1 See http://cherokeepreservation.org/what-we-do/cultural-preservation/cherokee-language/

2 *ga-du-gi: Working together to improve our community.* (2011). Annual report. Cherokee Preservation Foundation. See http://cherokeepreservation.org/wp-content/uploads/2014/03/gadugi-2011.pdf

With matching funding from EBCI tribal agencies and the federal government, CPF is financing energy-efficient lighting, low-flow bathroom fixtures, weatherization and insulation, and solar and wind energy demonstration projects. These efforts are expected to reduce energy use by 30%.[3]

Recycling, another important element of the plan, was inspired by work of the Cherokee Youth Council. According to Sky Kannott, program manager, the Youth Council helps young people become selfless tribal leaders grounded in the Cherokee tradition and culture. CPF funded the Youth Council with the expectation that youth 'become the leaders of their project,' Sky explained.

In 2010 the Youth Council decided to create a recycling program on the Qualla Boundary. Sky said that 'when they got the grant they went out and started educating the different programs throughout the community on how to recycle, what you can recycle, where to take it.'[4] They approached not just tribal offices and agencies but community clubs, stores, and businesses to get as many people involved as possible. The project garnered so much enthusiasm that CPF decided to support its expansion through Generations Qualla.

The remaining 30% of CPF grantmaking is targeted toward economic development. One of the foundation's earliest investments was in the creation of the Sequoyah Fund, a community development financial institution that provides low-interest loans to 'unbankable' small businesses along with education workshops and technical assistance to set businesses up for success.[5] Since 2004 it has created more than 900 jobs through loans of more than $12 million, $5.2 million of which has come from CPF. The remainder has been leveraged from federal government resources.

Over the years its programming has greatly expanded to support strategic regional economic development. The Sequoyah Fund partners with area community colleges and others to offer training and coaching on financial literacy, culturally based entrepreneurship, and business development skills for adults and youth, and it sponsors an annual business plan competition for college students at area Community Colleges and in the high school on the Qualla Boundary. Its newest initiative is to help Cherokee artists reach new markets and distribution channels for selling their art.[6]

WNC EdNet was the result of another investment in economic development, and one that also relied heavily on partnerships. CPF encouraged Cherokee school district administrators to collaborate with Western Regional Education Services Alliance (WRESA) to apply for a grant for broadband service in rural schools. CPF joined forces with other major regional funders such as the Golden Leaf Foundation, the Appalachian Regional Center, and the Rural Center to provide funding. According to Bob Byrd of WRESA, '(It's) one of the innovative things that I think Cherokee Preservation Foundation provides leadership in . . . collaboration at the funding level and bringing together planners.'

3 See http://cherokeepreservation.org/what-we-do/environmental-preservation/generations-qualla-sustainability-effort/

4 Cherokee Preservation Foundation. 2012. Sky Kanott: Cherokee Youth Council speaks about working with Cherokee Preservation Foundation. US. See https://www.youtube.com/watch?v=AXqMb-SbsNk

5 Borrowers are required to take a six-week training course and receive follow up technical assistance as part of the program.

6 See http://cherokeepreservation.org/what-we-do/economic-development/entrepreneurship/

Effective teamwork and collaboration helped make the complex project a reality. Susan Jenkins explained, 'it took a couple years, a lot of work, a lot of partnership, a lot of convening, but now we have broadband for over 60 schools in the seven-county area.' Public and charter schools, community colleges, and universities are among those with broadband access, and the technology supports STEM education.[7] Bob recognized CPF's commitment to working side-by-side with its grantees as a key to the foundation's success: 'It's a true partnership where the grantee and the grantor are in it together . . . and I think that's the strength of the whole way they do business here.'[8]

Partnerships

Partnership is not only the basis of CPF's grantmaking philosophy, it also drives the foundation's approach to planning. The Vision Qualla project of 2006 convened people from the Qualla Boundary and beyond – tribal government leaders, community members, non-profit organizations, local merchants, business people, artists, casino representatives and others – to articulate a 15-year vision for the foundation. As a result of this process, facilities and venues for artisan sales and theatrical performances were expanded and improved, a new wing was added to the Museum of the Cherokee Indian, fundraising from individual donors increased, electronic data collection and accounting systems were implemented, and a Cherokee Chamber of Commerce was created. Much of what was developed is still informing the work of the foundation today. In the follow-up project, Heart of Cherokee, three cultural institutions that had been working in isolation were brought together to develop a comprehensive and integrated brand to increase tourism and revenue at all three tourist attractions. Several departments within the EBCI were added to the group, which became known as the Greater Cherokee Tourism Council.

Of course, partnerships are not without pitfalls, one of which is the tendency to rush into a partnership without engaging in real issues. Susan Jenkins stresses that stakeholders need a tangible, common objective to commit to working together. 'The issue has to drive the partnership, not the other way around,' she said.

Partnerships and convenings offer the added benefit of helping to educate the community about CPF's methods and strategies and create a culture of accountability. In addition to bringing the community together in focus groups, workshops, or planning meetings, the foundation publishes an annual report, maintains an up-to-date website, invites tribal leaders on project site visits, and confers with tribal leaders during budget deliberations on grants to tribal agencies. This regular two-way communication is essential to maintaining the transparent flow of information and community support.

7 Cherokee Preservation Foundation. 2012. Susan Jenkins speaks about working with Cherokee Preservation Foundation. See https://www.youtube.com/watch?v=pVh5PU6L66k

8 Cherokee Preservation Foundation. 2012. Bob Byrd speaks about working with Cherokee Preservation Foundation. See https://www.youtube.com/watch?v=zncrte29-fs

Looking to the Future

CPF is making good progress toward its 2011–16 goals and has begun convening community groups to create goals and action plans through 2020. A major emphasis in the next several years will be on economic diversification to reduce the tribe's dependence on gaming revenue and stimulate more local entrepreneurship while staying true to Cherokee values. Of course, challenges exist on the path toward realizing these goals. One is the need to continue building capacity for local organizations so that more can become qualified, successful grantees. This requires that CPF continue to refine the transformational approach, striking the delicate between a grantee-grantmaker relationship that is too hands-on and one that is too hands-off. Another is the structure of the Compact with the state, which limits grantmaking to the three areas and does not allow CPF to make grants in health education and promotion, where support is sorely needed. Changing the Compact requires a vote by the state legislature, which is a lengthy though uncontroversial process.

Key Lessons

As the program approach and grantmaking results show, CPF's organizational culture encourages experimentation and iteration so the staff, board, and community are able to learn as they go. 'We're building a bicycle as we're riding it,' Susan Jenkins explained. However, the team relies on certain time-tested practices and philosophies to maintain the organization's success:

- **Require matching support from grantees, which may include in-kind support:** Matching grants increase the grantees' stake in the project and help reduce dependency on outside funding. The monetary value of in-kind support (such as labor, materials, land, etc.) should be quantified so grantees and the grantmaker can accurately calculate the contribution to the budget.
- **Be patient with implementation and realistic with project timelines:** It takes time to generate community involvement, but it's crucial for successful projects.
- **Be expeditious in grantmaking:** Once a grant is approved, it's important to make payments quickly and efficiently. This helps build trust between the grantmaker and the community, particularly in situations where the foundation budget comes from community funds.
- **Find an experienced leader to help get the foundation off the ground:** A foundation's early activities, interactions, and processes will set the tone for the community relationship for years to come, so it is important to have a qualified leader in the beginning to create a strong infrastructure and good communication to build long-term trust and support.

The GFCF works with individual community foundations and other local grantmakers and their networks, particularly in the global south and the emerging economies of Central and Eastern Europe. Through small grants, technical support, and networking, GFCF helps local institutions to strengthen and grow so that they can fulfill their potential as vehicles for local development and as part of the infrastructure for sustainable development, poverty alleviation, and citizen participation.

About the Author

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