



Multicultural Institute

CLP 2.0 Community Grantee Profile

This profile was developed with the support of the Packard, Irvine, and Hewlett Foundations through the Community Leadership Project 2.0 to share the story of how the Multicultural Institute has changed over the course of CLP 2.0.



Organizational Background & Community Context

The Multicultural Institute (MI, or the Institute), established in 1991, is dedicated to accompanying immigrants in their transition from poverty and isolation to prosperity and participation in society. MI accomplishes its mission by helping its constituents transcend socio-political and economic inequities. Headquartered in Berkeley, the Institute operates in the counties of Alameda, San Mateo and Contra Costa and is based respectively in the low-income neighborhoods of West Berkeley, North Fair Oaks, and Richmond.

MI's programs primarily serve immigrants from low-income backgrounds. Although MI has worked with different immigrant groups over the years, it has developed its strongest niche with Latino immigrants, particularly those from Mexico and Central America. The founder and current Executive Director, Rigoberto Calocarivas, is originally from Mexico himself. All of MI's staff members are bilingual and bicultural, with the majority being immigrants, which has been critical for building "confianza" or trust within the community it serves.

MI's unique service model to day laborers—based on daily, street-based outreach—is an "office without walls" and allows staff to offer efficient job-matching and social services while also improving conditions on the street where day laborers seek work. As part of this service model, local employers are able to hire day laborers through MI's website. This culturally responsive approach lends flexibility to the services provided and allows for cost-effective community partner engagement. In contrast, other organizations typically have a physical day laborer center where individuals are expected to visit to receive job-matching services. MI's service model honors day laborers' preference to be outside in the community proactively seeking work.

MI's four key programs aim to provide educational, economic, health, and leadership development opportunities for economically disadvantaged immigrants. The Day Laborer Program, MI's signature program, provides job matching services, wage claim assistance, emergency and food aid, and on-site health screenings and treatment in collaboration with partner providers. The GED Preparation Program prepares students with basic education in reading, writing, social studies, science, and mathematics. The courses are taught in Spanish at MI's Richmond and Berkeley locations. The Business Skills Program offers courses in business planning, bookkeeping, taxes, and marketing to assist self-employed immigrants and immigrant small business owners. The Mentoring for Academic Success Program serves under-represented students through academic tutoring and parent enrichments workshops.

Resilient Leadership

- Unified sense of purpose and trust
- Organizational leaders with the abilities and relationships necessary to serve the target community
- Opportunities to share leadership and develop leaders

Multicultural Institute at Baseline

MI's was well positioned for CLP 2.0 due to its participation in CLP 1.0. With the support of CLP 1.0, MI developed a five-year strategic plan that outlined several organizational priorities and accompanying strategies. Key priorities outlined in the strategic plan addressed the following organizational development areas: regional impact, general program development, program development of geographic specific programs (i.e., North Fair Oaks/San Mateo County, Richmond/Contra Costa County, and West Berkeley/Alameda County), program development for youth academic programming, sustainability, governance, human resources, and branding. For CLP 2.0, MI's vision for change is focused on bolstering **financial stability** and **adaptive capacity** through three key goals: 1) increase donor base in San Mateo County; 2) increase institutional capacity to provide immigration-related services to immigrants in Redwood City/North Fair Oaks area; and 3) update technological infrastructure. All three of these goals are taken from MI's recent strategic plan. Two of the goals are specific to San Mateo County but also contribute to the overall sustainability of the organization. The third goal, building technology infrastructure, is intended to foster effective and efficient communication between the main office and the program sites.

MI has already reached significant milestones during its CLP 2.0 organizational development journey. Between June 2013 and February 2014, the Institute added three full-time staff positions to support the organization's expansion and growth. MI is currently in the process of completing the purchase of its West Berkeley building. Moreover, the organization's annual revenue for fiscal year 2013 increased 14% from the previous fiscal year.

Assessment of Baseline Capacity

The following describes MI's strengths and challenges with regard to CLP 2.0's core outcome areas of: (1) resilient leadership, (2) adaptive capacity, and (3) financial stability.

Resilient Leadership

Resilient leadership was not identified as a priority focus area in part because the organization has had the same executive director since the organization was founded in 1991. Moreover, MI's Day Laborer Program has retained the same Program Directors since the program's inception. MI's stable leadership has allowed for better coordinated management of personnel issues, new development and fundraising initiatives, quality program oversight, and ongoing relationship-building with community partners. In addition, MI's stable leadership and low staff turnover has allowed the organization to focus its energies on developing and strengthening its community programs and services. MI's organizational assessment indicated that its greatest strengths in this outcome area are around: *Shared Purpose, Vision and Goals, Staff Expertise, and Decision Making Process*. In contrast, MI's key challenges in this outcome area are around: *Training, Regular Evaluation, Strategic Planning Tools, and Fundraising Plan*. MI staff provided feedback on the organization's baseline capacity as it relates to the three measures of resilient leadership identified for CLP 2.0:

- Unified sense of purpose and trust across Board, staff, and/or volunteers:** MI works to build a unified sense of purpose and trust in part through careful interviewing and organizational procedures. For example, MI's board members are carefully selected through an interview process with board members and leadership staff to ensure that they are aligned with the organization's mission and values. Moreover, MI strives to have a diverse board that is representative of the communities it serves. As a part of the on-boarding process, board members are invited to observe the Institute's programs and services.

Building off its efforts to improve board governance under the CLP 1.0 grant, MI convenes its board six times each year to provide programmatic and financial updates that help maintain organizational transparency and create a strong sense of trust among board members.

- Organizational leaders with the abilities and relationships necessary to serve the target community:** All MI staff are bicultural and bilingual—with the majority of them being immigrants—and demonstrate a strong commitment to helping low-income immigrants in the Bay Area. When hiring new employees, the executive director and associate director prioritize experience working with immigrant communities over other skills and experiences.
- Opportunities to share leadership and develop leaders:** MI supports the leadership development of staff by involving them in programmatic decision-making and sharing supervising responsibilities. As part of its CLP 2.0 goal to increase its presence in San Mateo County, MI wants to support line staff's oversight of the San Mateo County Day Laborer Program. At times MI leaders have restructured job positions to draw from employees' strengths in addition to supporting their professional development in areas in which they are less strong. For example, employees have previously taken GED and computer classes to upgrade their skills. Moreover, all of MI's staff recently completed a 40-hour training on immigration issues, a critical first step towards the organization's goal to apply for Board of Immigration Appeals agency recognition and staff accreditation, thereby expanding MI's capacity to provide immigrant-related services.



Adaptive Capacity

Adaptive capacity is one of MI's areas of focus for the CLP 2.0 grant. Specifically, MI plans to increase its adaptive capacity by developing its IT infrastructure and expanding its immigration-related services. MI's organizational assessment indicated that its greatest strengths in this outcome area are around: *Vision and Goals, Commitment, Cultural Alignment and Decision Making*. In contrast, MI's key challenges in this outcome area are around: *Strategic Planning Tools, Fundraising Plan, Communications Strategy, and Monitoring External Trends*. MI leaders provided a sense of organizational strengths and challenges with regard to the four specific adaptive capacity outcome measures identified for CLP 2.0:

Adaptive Capacity

- Clear strategic goals and a plan to achieve them
- Ability to mobilize resources to tackle challenges
- Flexibility to align with shifting conditions
- Ability to improve performance based on self-reflection and evaluation data



- **Clear strategic goals and a plan to achieve them:** MI has invested significantly in strategic planning to guide its organizational growth and development. The organization holds annual board and staff retreats to develop a plan for the year. In 2011, with the support of the CLP 1.0 grant, MI's leadership began an assessment and planning process to strengthen the organization's capacity to undertake and sustain transformational change work with its core constituencies. This process involved developing a five-year strategic plan that outlined the organization's priorities and accompanying strategies for the Institute in each program area, specific leadership imperatives needed to accomplish each objective, and resources that are required for success. Building upon this work from the CLP 1.0 grant, MI plans to focus on specific priorities and strategies outlined in its recent strategic plan during CLP 2.0.
- **Ability to mobilize resources (people and organizations) to tackle challenges:** MI is particularly adept at mobilizing resources to tackle challenges faced by its constituencies, which is demonstrated by the successful launch of the San Mateo County Day Laborers program. In 2006, MI successfully responded to San Mateo County's RFP to provide job-matching and social services to individuals seeking work as day laborers in the unincorporated North Fair Oaks neighborhood. MI collaborated with the County Board of Supervisors, the County Human Services Agency, and the Sheriff's Office to support workers in their quest toward economic self-sufficiency. Through its effective on-the-street approach, MI staff built trust and rapport with the day laborer community and provided them with job and training opportunities. Moreover, MI was able to coordinate with local health providers, hospitals, and non-profit organizations to ensure that health services were provided to day laborers. MI was also able to engage the day laborers to participate in monthly street clean-ups, which allowed the day laborers to be viewed more favorably in the local community. In fact, after the first year of MI's services to day laborers, the County Board of Supervisors decided to suspend a no-solicitation ordinance aimed at day laborers. MI staff rapidly became part of a network of organizations and individuals, facilitating better coordination of referrals and services to local day laborers.

- Flexibility to align with shifting conditions (in community, financial, and political environment):** MI demonstrates a strong commitment to adapt its programs and services to effectively meet community needs, particularly in light of the rapidly changing landscape of immigration reform and economic forces. During the economic crisis of 2008, for example, MI was able to sustain its San Mateo County Day Laborer program without having to diminish services or lay off staff. The Institute was able to do this through conservative fiscal management and leveraging space, goods, and services at subsidized rates or no cost from its institutional partners. As another example, MI increased its capacity to support day laborers on legal issues in response to a local legal clinic scaling back services to workers with wage claim cases. MI consulted with the Legal Aid Society Employment Law Center of San Francisco to establish procedures for handling these types of cases. MI also enlisted an attorney to provide pro-bono representation in selected cases. Through these efforts, MI was able to increase both the quality and quantity of the legal assistance services it offers. In fact, between 2006 and 2012, MI nearly doubled the number of legal referrals and services provided to day laborers. With an eye toward greater expansion, MI is taking the necessary steps to obtain accreditation to represent individuals before the Bureau of Immigration Appeals.
- Ability to improve performance based on self-reflection and evaluation data:** MI's work is grounded in the understanding that self-reflection and evaluation are necessary components of continual program improvement processes. As an example, MI commissioned an external evaluation in 2012 of its San Mateo County Day Laborers Program. The evaluation drew from survey feedback from non-profits, county partners, employers that hire day laborers, local merchants, and day laborers to distill the program's strengths as well as potential areas for improvement. For the CLP 2.0 grant, MI will be building on the evaluation findings. One of the key recommendations highlighted in the evaluation report was "to focus on building the program's sustainability and helping it become an institutionalized program within the community." Accordingly, MI's strategic plan prioritized exploring options for expanding or restructuring the San Mateo County Day Laborers Program so that it is more autonomous and effective. This will be a primary focus of MI's CLP 2.0 grant-related activities.

Financial Stability

MI's financial stability has remained one of the organization's strengths. The three years of CLP 1.0 involvement (2010 – 2012) coincided with MI's transition from a \$400,000 annual budget to one exceeding \$500,000 with marked increases in net assets. MI maintains a diverse funding base drawing from a mix of public sector contracts, foundation grants, private giving, and fundraising events. Additionally, MI has successfully leveraged space, goods, and services from its partners at little or no cost. Because MI serves as a model for effective financial management, MI has assisted other non-profit organizations with establishing their financial and bookkeeping systems. Additionally, MI has served as a fiscal sponsor for other organizations. Although financial stability has been, and continues to be, one of MI's key assets, the organization plans to focus on diversifying its funding base to support its San Mateo County Day Laborer Program under the CLP 2.0 grant. MI's organizational assessment

Financial Stability

- Financial literacy across board and staff
- Appropriate systems in place to reliably track and report financial information
- Data-driven approach to financial management and decision-making
- Clear and effective business model in place

indicated that its greatest strengths in this outcome area are around: *Accounting System, Bookkeeping, Internal Controls, Reporting to Funders, Budget Modifications, Reporting to Board, and Cash Flow*. In contrast, MI's key challenges in this outcome area are around: *Board Financial Capacity, Business Model, and Fundraising Plan*. MI staff provided feedback on its baseline capacity as it relates to the three measures of financial stability developed for CLP 2.0:

- **Financial literacy across board and staff that allows for collective stewardship of the organization's financial health:** While the executive director, associate director, and the accountant are primarily responsible for tracking organizational expenses, all staff members are able to weigh in on organizational budget decisions. Internal financial reports, including profit and loss statements and balance sheets, are submitted to the board for review six times per year. The board has an active fundraising committee that coordinates annual events.
- **Appropriate systems in place to reliably track and report financial information:** MI has several notable established systems and processes that contributed to its strong financial stability at the onset of CLP 2.0. Chief among these is the fact that MI has had a full-time accountant for several years, which has allowed the organization to adopt and follow good bookkeeping practices.
- **Data-driven approach to financial management and decision-making:** MI creates its budget each year based on the previous year's actual expenses plus the cost of adding one new staff member. During the year, any expansion or beyond-routine expense is carefully considered so that expenses will not outpace MI's ability to pay for them. MI has had a balanced budget for several years.
- **Clear and effective business model in place:** Respondents reported that MI has no business model in place. Staff rely on the organization's strategic plan to inform decisions related to finances and fundraising.



Anticipated Outcomes and Capacity Building Approach

The work that MI has begun under CLP 2.0 grant is very much aligned with its overall organizational priorities, as MI's CLP 2.0 goals were taken directly from the organization's recent strategic plan. Although the ultimate impact the CLP 2.0 grant is yet to be determined, leadership staff believes that MI is headed in the right direction for increasing its organizational capacity in key areas. MI's priority focus areas and core activities for CLP 2.0 are as follows:

- **Expand immigration-related law services.** To address service gaps in the community, MI has made a concerted effort to build its organizational capacity to provide immigration law-related services. MI is currently in the process of exploring the possibility of obtaining accreditation to represent individuals in front of the Bureau of Immigration Appeals. A critical step toward this goal is training staff in immigration-related issues, which was recently completed with the support of the CLP 2.0 grant. The organization also aims to expand its partnerships with legal organizations and individual lawyers that can help day laborers and others to take advantage of Deferred Action for Childhood Arrivals (DACA) legislation and any new opportunities to adjust immigration status.
- **Strengthen information technology infrastructure.** MI aims to strengthen its IT infrastructure so that the main office based in Berkeley can communicate effectively and efficiently with the other program sites. Specifically, MI is in the process in moving its client database system to the cloud so that files can be easily accessed by any of the program sites. Under the CLP 2.0 grant, MI has received technical assistance from Zero Divide to upgrade its IT systems.
- **Diversify funding for the San Mateo County program.** To sustain MI's presence in San Mateo County, the organization is interested in developing a network of individual donors who are specifically interested in MI's San Mateo County-based work and who can become long-term supporters. In addition, MI has been utilizing the findings of the recent external evaluation of the first six years of MI's work in San Mateo County to increase local awareness about MI. In addition, with the support of Zero Divide, the organization has made continuous improvements to MI's new website (www.mionline.org) to present stories, videos, and other program outcomes in ways that are engaging to potential donors.

