



## 2023 Operating Plan

### Mission & Vision

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#### Mission:

The mission of the Inland Empire Funders Alliance is to advance equity, advocacy, and systemic change in the Inland Empire by uplifting the region's assets and opportunities, and leveraging resources for impact.

#### Vision:

We create a thriving Inland Empire by advancing equity, inclusion, and justice through...

1. **Strengthening philanthropy:** organizing funders, advancing systemic change in philanthropy, and promoting equity, inclusion, and justice.
2. **Strengthening the nonprofit sector in the IE:** building capacity of the nonprofit sector and supporting advocacy — by and for the sector, and for our guiding principles.

### Priorities for 2023

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1. **Advance systemic change in philanthropy by promoting participatory and trust-based practices and strategic collaborative grantmaking.**
  - a. Implement a learning agenda highlighting opportunities for equity, advocacy, and systemic change.
  - b. Catalyze at least one new collaborative funding initiative.
  - c. Finalize, utilize, and disseminate our Collaborative Grantmaking Toolkit.
  - d. Strengthen and deepen relationships among IEFA members and with community-based nonprofits.
  - e. Integrate trust-based philanthropy principles and practices into our member meeting programming and other IEFA practices.
2. **Identify and integrate opportunities for action team collaboration to further IEFA's mission and goals.**
  - a. Strategically incorporate advocacy planning and collaborative grantmaking efforts within 2023's Learning Agenda programming arc.

- b. Apply the Collaborative Grantmaking toolkit to our collaborative grantmaking initiative(s).
  - c. Identify additional ways action teams can support each other in progressing towards their goals for the year.
- 3. Operationalize our pillar of advocacy and build a plan for individual, organizational, and institutional advocacy activities.**
- a. Garner membership buy-in and support of IEFA advocacy.
  - b. Continue to create opportunities for members to learn about the diverse methods of advocacy and how they can participate.
  - c. Identify realistic next steps towards building an advocacy plan for IEFA.
- 4. Continue building our membership and capacity.**
- a. Continue to build out Active Campaign in service of consistent member communications and engagement, membership administration, and fundraising.
  - b. Identify and engage member prospects to ultimately increase paid membership to meet a goal of \$90k.
  - c. Develop the remainder of our annual budget through general operating and/or project-specific grants (approximately \$90-120k based on program activities).
  - d. Integrate connecting sessions within our bimonthly member meetings to promote cross-member relationship building and collaboration.
  - e. Obtain sponsorships from members to defray costs of bimonthly member meetings.
  - f. Expand staffing (contractor or employee) capacity to improve member communication, development, and engagement.
  - g. Contract a new webmaster to transfer hosting, update, and enhance the IEFA website.

### Potential priorities for 2024 & 2025

1. Institutionalize policies and practices that reflect our commitment to equity, inclusion, justice, and anti-racist practices.
2. Member representatives' individual statement of commitment to TBP within their own sphere of influence
3. Develop/adopt standards of practice for P/TBP
4. Conference presentations disseminating the Collaborative Grantmaking Toolkit
5. Develop a more public Narrative Agenda based on our Learning Agenda
6. Implement a program recognizing members successfully implementing P/TBP practices at the individual and organizational levels.
7. Develop an action-oriented Collective Impact Agenda

## 2023 Organization Structure and Scope of Work

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### Action Teams

#### 1. **Advocacy Planning Action Team (Suzie Gomez)**

The purpose of the Advocacy Planning Action Team is to operationalize IEFA's guiding principle of Advocacy by developing a plan defining the potential role(s) IEFA and its members play in advocating for equity and systemic change in the region. The plan will include recommended organizational strategies and policies for IEFA and our members to engage in advocacy — with, by, and for our nonprofit partners, the community, and philanthropy.

- a. Identify and implement 1-2 next step objectives to advance the development of an IEFA advocacy plan/strategy. Priority items for 2023 include:
  - i. Finalize IEFA advocacy definition
  - ii. Interview corporate funding IEFA members for input (currently three member categories: banks, healthcare, SCE)
  - iii. Define process and policy for emergent requests, e.g. funding letters of support.
  - iv. Create IE advocacy inventory (i.e., who is doing what currently in the region)
  - v. Create infrastructure/systematic ways to engage in each type of advocacy, as well as recognize a process to add other avenues in the future

#### 2. **Learning Agenda Action Team (Margarita Luna and Diana Fox)**

The purpose of the Learning Agenda Action Team is to challenge assumptions, foster learning, catalyze collaboration, and spur innovation by developing a coherent program of sector-spanning convenings and action-oriented conversations in collaboration with community and philanthropic partners.

- a. Develop and implement bimonthly member meeting programming, including 3 learning sessions and 3 connecting sessions.
- b. Identify opportunities for integration of programming with other action teams, particularly Collective Grantmaking Initiatives and Advocacy Planning
- c. Convening and matchmaking within funder communities of practice (e.g., matchmaking series with different topics such as education with breakout group discussions to help identify things like gaps, best practices, how we can maximize our leveraging of resources in this area).

### **3. Collaborative Grantmaking Initiatives Action Team (Denisha Shackelford)**

The purpose of the Collaborative Grantmaking Initiatives Action Team is to uplift the IE region and its needs by mobilizing pooled resources into the community and transforming philanthropic practice.

- a. Provide ongoing support of and fundraising for the Black Equity Fund (BEF) until initial \$5 million goal is reached.
- b. Design and implement a Fast Pitch program to surface opportunities for one or more new collaborative grantmaking initiative(s).
- c. Collaborate with BEI and IECF on evaluation of the BEF partnership.
- d. “Road test” CGI Toolkit by applying it to any new CGIs.
- e. Identify opportunities for integration of programming with other action teams, particularly Collective Grantmaking Initiatives and Advocacy Planning

### **4. Collaborative Grantmaking Toolkit (Anita Dharapuram and Krista Jensen)**

- a. Finalize, disseminate and present Collaborative Grantmaking Toolkit.
- b. Collaborate with CGI AT on implementation of Toolkit in current and new CGIs.
- c. Receive feedback and refine Toolkit as needed.
- d. Produce public-facing version of Collaborative Grantmaking Toolkit and disseminate.
- e. Collaborate with Learning Agenda AT in designing learning opportunities on applying toolkit principles and tools in member grantmaking practice.
- f. Collaborate with Learning Agenda AT on operationalizing member survey results by convening communities of practice and proactive matchmaking.
- g. Identify opportunities for integration of programming with other action teams, particularly Collective Grantmaking Initiatives and Advocacy Planning

## IEFA Governance & Administration

### **I. Membership, Governance, and Capacity Building**

- h. Membership Development & Engagement
  - i. Integrate membership communications and application processing with ActiveCampaign CRM system
    1. Develop and implement new membership application form
    2. Identify and engage prospective members
    3. Manage membership including renewal reminders, data collection and management, information sharing, and other communications
    4. Update IEFA-SCG procedures to reflect new workflows

- ii. Finalize member communications role: objectives, role description/RFQ, selection, and onboarding
- iii. Expand use of Slack to include action team members (for collaboration) and full membership (for member communication, info sharing, and ongoing engagement)
- i. Governance
  - i. Revise and finalize Advisory Board bylaws, Advisory Board and officer role descriptions,
  - ii. Update, revise and finalize Org Chart and Narrative
  - iii. Develop and manage budget and related finances
  - iv. Draft and finalize 2023 Operating Plan
- j. Infrastructure
  - i. Further develop IEFA website management infrastructure and public/member-facing content
  - ii. Further develop Active Campaign CRM infrastructure for communications, event management, and membership
  - iii. Improve project management infrastructure and workflows
    - 1. Identify, develop, and maintain an internal project management system
    - 2. Develop IEFA decision-making matrix
    - 3. Organize IEFA shared files in simplified structure

## **2. IEFA Advisory Board**

- k. Engage in fundraising and membership development for IEFA operations and programming
- l. Define policies and standards for approval/decision by Advisory Board for key AT efforts and other institutional needs
- m. Engage in a conscious development process around JEDI (Justice, Equity, Diversity, Inclusion)
- n. Share updates and uplift opportunities for cross-AT collaboration
- o. Convene for strategic planning retreats
- p. Develop the 2024 Operating Plan (by November, 2023) and budget (by December, 2023)