



STRATEGIC PLAN

2020 - 2023



INTRODUCTION

As the Inland Empire Funders Alliance celebrates 10 years of work to elevate our region, we have undertaken a deep reflection on the needs of the region and its stakeholders, and where our shared efforts can make the greatest impact in the emerging future.

This strategic plan was finalized amid the emergent unfolding of the COVID-19 pandemic. Although the crisis and its ramifications are still developing, we are already seeing indications of how it will leave no resident untouched and be devastating to those already teetering on the edge of survival in the Inland Empire. Low-wage service workers are being laid off in large numbers; working parents have very few child-care options; elderly and fragile people are isolated in their homes; and all of us are vulnerable



to contracting COVID-19 and the ensuing medical bills it will cause. The nonprofit organizations that serve, support, and advocate for those communities are also confronted with the rapidly increasing need for assistance and challenges ranging from how to provide services, to how to protect their own staff, to rapid drops in fundraising, to building resilience for a potentially deep and extended recession. And we expect these impacts will be exacerbated in communities of color and others that have historically borne the brunt of disadvantages in health, education, and economic opportunity.

This crisis lends a greatly increased urgency to the mission and work of the Funders Alliance, and to the strategies we have laid out in our planning process. The Funders Alliance's role in helping the region's grantmakers share knowledge, align strategies, and leverage philanthropic impact is more vital than ever. As never before, we are called to be a voice for equity, advocacy, and systemic change in our region. We remain committed to the basic underlying values and strategies outlined in this strategic plan, although we recognize that evolving needs and events will affect their relative prioritization and timing.

Our strategic planning endeavor engaged the entire membership of the Funders Alliance in a multi-stage process based on principles of adaptive leadership and strategic thinking designed to

address the networked nature of the Alliance, the broad diversity of our membership, and the multifaceted, constantly evolving needs of the region. This planning process included:

- Review of existing data and analysis on the scope and state of the region and its philanthropic and nonprofit sectors. (February–March, 2019)
- Consultation within funder subsegments (banking, health, private foundations, corporate, public/tribal, and local intermediaries) to identify key trends in the philanthropic field and in the region as a whole. (March–April, 2019)
- Interviews by members with their internal stakeholders and grantees on challenges facing the community and nonprofit sector, and how the Funders Alliance might add value to both our own institutions’ missions and the community’s aspirations. (April–May, 2019)
- A full-day retreat synthesizing the above inputs to generate guiding principles and strategic directions for the future. (May, 2019)
- Follow-up work in sub-groups to operationalize the strategies and define structures, processes and resources to implement them in an integrated fashion. (June, 2019–January, 2020).
- Strategy alignment (“crosswalk”) meetings to address synergies between implementation plans for the strategies, including timelines, resources, and Action Team structures to carry them out, especially in light of changing priorities due to the emerging COVID-19 crisis. (January–March, 2020).

LOOKING BACK TO MOVE FORWARD

Purpose

The Funders Alliance was initially formed in 2009 in recognition of the need for greater communication, collaboration, and coordination among major funding organizations in the two-county region. The founding purposes still remain relevant today:

- Regional networking and information sharing between major
- funders
- Advocacy for the needs of the region
- Leveraging of funds to maximize impact on common goals
- Increasing the capacity of service providers within the region

Past Efforts and Accomplishments

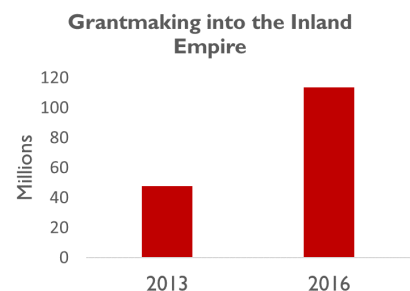
We recognize that our future impact will be built on our past accomplishments and learnings. Major initiatives over our first 10 years have included:

- Outreach and education with funders in the Los Angeles metropolitan area and statewide to raise awareness of the unique needs and assets of the Inland Empire, regional and peer-to-peer advocacy to increase their grantmaking engagement in the region.
- Successful implementation of the Expanding Nonprofit Excellence project, a cohort-based capacity building program aimed at supporting promising nonprofits to increase their effectiveness and readiness to scale impact.
- Listening sessions to build relationships and increase communication, trust, and learning among nonprofits and funders in the region for more responsive grantmaking and intersectoral collaboration.
- Development of the Guide to Promising Initiatives for Funding Investments in Inland Southern California, a directory of collaboratives and nonprofits in the region with a track record of successful impact and stewardship of resources.
- Co-convening and incubation support for the Inland Empire Capacity Builders' Network, a collaborative of nonprofit providers of training and management support services to local nonprofits across the two-county region.
- Development and implementation of the Changing the Narrative campaign to shift multi-sectoral stakeholder perceptions of the Inland Empire and generate a more coherent, affirming, and balanced framing of the region's assets, needs, and potential.
- The coordinated IECOUNTS initiative for a Census 2020 complete count in the region, with philanthropic funders strategically complementing public resources through a co-funding initiative and pooled grantmaking fund of \$1.6 million to support local nonprofits engaged in community outreach and infrastructure-building efforts.



These ongoing efforts have borne tangible fruit, with key results including:

- Grantmaking into the region by external foundations has increased by 143%, from an estimated \$46.7 million in 2013 to \$113.6 million in 2016.



- In the past five years Funders Alliance membership has more than doubled, indicating increased interest and member value on the part of grantmakers.
- Relationships among funders, nonprofits, capacity builders, and the communities they serve have been strengthened and deepened.
- A reputation has been established for the Funders Alliance as a sought-after resource helping funders learn about the Inland Empire by creating informational resources on the region's unique needs, assets, and opportunities for grant investment.
- The Funders Alliance has become an advocate for Inland Empire nonprofits. There is an opportunity to extend that role to increase influence with business and public sectors.
- The Inland Empire Census Funders Table leveraged relationships to raise \$1.6 million in pooled funding for Census outreach efforts across the Inland Empire. Additional resources were also mobilized as co-funding by Funders Alliance members.

REVISED MISSION STATEMENT

Based on our purpose, experience, and view of the future, we affirm the following as the mission of the Funders Alliance:

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 by leveraging resources for impact.

WHERE WE ARE NOW: VALUE TO STAKEHOLDERS

For any collaborative network to be effective and sustainable, it must simultaneously serve the needs and aspirations of both external stakeholders while also aligning with its member organizations' individual missions and strategic priorities.

Outside-in: What do external stakeholders want and need from us?

As an Alliance, we hold ourselves accountable to our various stakeholder groups, in particular the community, nonprofits, business, and government. Through conversations with those external stakeholders, we have identified that we can best serve those them by:

- **Partnering with corporate and government sectors** to serve as a thought partner and a resource on shared concerns, even as we recognize and constructively address areas of friction or divergent interests.
- **Fostering trusting relationships with nonprofits** that go beyond the grantee/grantor dynamic by inviting open and honest conversations and implementing grantmaking processes based in trust (e.g. co-designing funding programs).
- **Allowing ourselves to be held accountable** by stakeholders by committing to increased transparency (with appropriate spaces for funder-only peer conversations) and by supporting the development of nonprofit leaders capable of engaging with funders in open, frank, and constructively critical conversations.



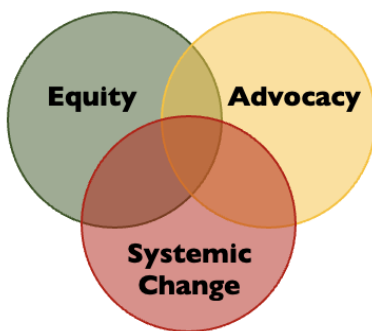
Inside-out: What value do our own institutions want from the Funders Alliance?

Through the same activity as above, the members believe that their own institutions want clarity on the mission of Funders Alliance, information sharing, advocacy, and accountability. Specific forms of member value include:

- **A forum for dialogue** to develop common definitions, deeper understanding, shared language, and aligned narrative regarding the region and issues affecting it.
- **Information sharing** on strategies, best practices, data, and members' funding activity to align and leverage resources, and inform members' practice.
- **Increased collaboration**, including further co-funding and pooled funding activity.
- **Implementing bold programming and taking stands on issues** affecting the region, recognizing that our diversity means not all members will join on every issue or position.
- **Leveraging relationships** to expand our membership and advocate with other funders.

GUIDING PRINCIPLES: HOW WILL WE GO ABOUT MAKING CHANGE?

In our consultation with both internal and external stakeholders, we identified several cross-cutting themes that reflect the current state of our region and philanthropic practice.



These principles will guide all our action strategies:

- **Equity:** Recognition of the imperative to advance social equity and racial justice, including disparities affecting communities of color and Native American communities.
- **Advocacy:** Increased emphasis on advocacy — on behalf of our nonprofits, and also building nonprofits’ and communities’ capacity to engage in local policy advocacy.
- **Systemic change:** Comprehensive, collaborative, upstream approaches to address underlying factors that drive health (social determinants), educational (cradle to career), economic (inclusive economic development), or other population-level outcomes.

STRATEGIC DIRECTION: WHAT SUBSTANTIVE ACTIONS WILL THE FUNDERS ALLIANCE TAKE?

To put these principles into action and expand the value we provide to both stakeholders and members, we have identified three strategic priorities for action over the period of 2019-2023.

Leverage Our Resources:

We will maximize our individual and collective grantmaking impact by internally sharing information and data on our own funding activities and strategies, and by organizing ourselves as funders to engage in co-funding or pooled funding for shared impact.

To carry out this strategy, we will:

- Respond proactively and agilely to the emergent COVID-19 crisis through the Funders Alliance Rapid Response Fund and additional targeted co-funding and pooled funding as needs and strategies evolve.

- Collect comprehensive data on Funders Alliance member grantmaking priorities and current funding activities in the region to identify common areas of funding as communities of interest or peer groups for potential collaboration.
- Build a simple, action-oriented process framework for collaborative grantmaking to guide Funders Alliance approaches to co-funding and pooled funding.
- Create or find simple toolkit resources to support standard processes for collaborative funding, and to provide a framework defining “shared impact.”
- Engage Funders Alliance members in a proactive and planned discussion on further opportunities, interest, and approaches to strategically align our individual and collective grantmaking in the region.

Advance Our Collective Impact:

We will elevate the region’s needs and assets so we can be more bold, strategic, and generative in our individual and collaborative action and that of other regional stakeholders. This will involve promoting multi-sectoral dialogue to learn about important regional issues; shaping narratives and awareness of potential solutions; and strategically elevating issues and opportunities on which resources and efforts can be focused.

Implementation of this strategy will entail the following actions:

- **Create a Learning Agenda** spanning philanthropic, nonprofit, and public and private sectors increasing knowledge and commitment to equity, advocacy, systemic change, intersectionality, and effective leadership of collaborative networks. This includes identifying and uplifting existing collaborative networks and Collective Impact initiatives in the region; gathering input from nonprofits and other sectors; and conducting formal learning sessions with Alliance members and others to build understanding.
- **Develop a Narrative Agenda** to build awareness and connect resources to needs and assets in the Inland Empire to advance advocacy, equity, and systemic change by using the power of storytelling to uplift collective impact initiatives, drive conversations on regional needs and assets, and share data that is relevant locally/regionally.
- **Foster a Collective Impact Agenda** that provides a shared vision across sectors, breaks down silos, and leverages assets and resources to act upon equity, advocacy and systemic change.

Strengthen our Capacity and Infrastructure:

To enable the other two strategies, we will build our own capacity through effective structures, operating principles, policies, resourcing, staffing, and ongoing self-evaluation for accountability, learning, and adaptation.



This includes action to:

- Define a core leadership structure and roles for organizational effectiveness while ensuring mutual governance accountability.
- Convene “action teams” to effectively address our strategic action priorities as time-limited, task-oriented project teams advising and overseeing contracted consultants or others responsible for staffing them.
- Define staffing support needs for core backbone coordination and communication support, and targeted expertise for specific needs.
- Define member criteria to ensure an inclusive and engaged membership.
- Ensure sustainability of the Alliance by defining expectations for financial contribution from members to the Funders Alliance, whether via membership dues, sponsorship, or grantmaking.

Each of these strategies has been operationalized in an initial action plan, and will be implemented through a series of project-based Action Team with staffing support from contractors or employees of Funders Alliance members. Specific anticipated human and other resources are outlined in those implementation plans, and will be budgeted for on an annual and/or as-needed basis by the Executive Committee.

This plan was developed under the leadership of the Funders Alliance’s 2019-2020 Executive Committee:

Celia Cudiamat
Chair, Funders Alliance
Senior Vice President
The IE Community Foundation
ccudiamat@iegives.org

Margarita Luna
Vice Chair
Senior Program Manager
The California Endowment
MLuna@CalEndow.org

Cindy Faulkner
Vice Chair
Assistant Director
First 5 San Bernardino
cfaulkner@cfc.sbcounty.gov

The planning process was facilitated by Max Freund of Praxsys Leadership (max@praxsysleadership.com).