



# Strategic Business Plan

## 2021-2024

**David McCoy, Board President**  
**Susan Gomez, Chief Executive Officer**

Draft 1 as of September 2021

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## I. Introduction and Executive Summary with Strategic Recommendations

### INTRODUCTION

First 5 San Bernardino has been a leader in supporting capacity building for the nonprofit sector, having funded annual Capacity Building Academies (CBA) for nonprofit agencies since 2010. The CBA is a year-long training and education process that results in each member organization developing a sustainability plan that directly responds to the needs and priorities of their target audiences and local communities. These academies, graduating from seven to ten agencies per year, have strengthened county nonprofit organizations by focusing on sustainability planning to support the development of strong, adaptive, sustainable organizations that serve the Inland Empire.

From the agencies that participated in the initial CBA cohorts (CBA I and CBA II), the IECC was established. Having created their own sustainability plans and appreciating the value of the peer support they received through the academy structure, graduates of CBA I and CBA II, formed an informal association amongst themselves. Fourteen nonprofits representing homeless and emergency services, family support, domestic violence prevention and intervention, behavioral health supports, new parent programs, and early care and education services continued to meet beyond their involvement in the CBA to identify and act upon opportunities to support each other's efforts. With this, the Inland Empire Community Collaborative (IECC) was established.

The IECC combines the strengths and resources of larger nonprofit organizations with those of smaller, community-led organizations in a mentoring relationship, following the premise of "a rising tide raises all boats," to enrich and enhance health and human services in the Inland Empire. Member agencies contribute resources to the IECC either through time, in-kind contribution, or with the use of grant funds. Each agency also has a designated representative to participate in the planning and development of the IECC and commits to working with other members to achieve the IECC's mission. The IECC has graduated over 87 nonprofits through the academy. Current IECC active members are 18 non-profit organizations and is expanding its reach to include both San Bernardino and Riverside county agencies.

In turn, we now offer our own Capacity Building Academy; provide ongoing technical assistance workshops; convene an annual conference to ensure that organizations thrive; and offer diagnostic assessments to individual nonprofits helping them to identify their strengths as well as areas that need improvement; and with this plan, we will add another program component: increasing the pipeline of workers ready to serve in the nonprofit sector, including prioritizing advocacy and equity throughout the nonprofit sector.

Through this planning process we now aim to grow strategically. We surveyed the needs of our nonprofit community, interviewed diverse stakeholders, assessed our capacity, identified our strengths, challenges, and opportunities, and envisioned our future. We invested many hours and months into this planning process. Throughout we asked ourselves difficult questions and invited others into the conversation; we were critical of our work, challenged our assumptions and each other. Above all, we were intentional in our desire to be bold and ambitious, as well as realistic and practical.

The board and staff of Inland Empire Community Collaborative are now proud to present this strategic plan. Its core includes an updated vision, values, and mission statements to articulate who we are, who want to be, and

why we do what we do. Implementation of this plan will make us more effective, more efficient, and more engaged in our community and with each other as Board and staff. We invite you to join us.

We are grateful to all those who lent their support and voices to this project. This strategic plan would not have been possible without the generous support of Inland Empire Community Foundation, nor without our community stakeholders who shared feedback along the way.

David McCoy, Chair of the Board

Susan Gomez, Chief Executive Officer

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## EXECUTIVE SUMMARY WITH STRATEGIC RECOMMENDATIONS

Informed by community needs, and appreciating the landscape of other existing management service organizations in the region, the Board and staff approve the phased implementation of three strategic areas:

1. As to our **Programs & Services**: We will strengthen the capacity of emerging as well as current nonprofit organizations through our menu of diverse strategies. Specifically, we will:
  - a. Enhance our signature programs and strengthen their evaluation to show impact: The Capacity Building Academy, our Technical Assistance workshops, and our Core Capacity Assessment Tool diagnostic.
  - b. Provide support to organizations which collectively have an impact, by serving as the backbone for the collaborative, but not when the collaborative is forced or imposed.
  - c. Streamline our annual Conference to ensure that nonprofits thrive.
  - d. Add a new program component to increase the region's workforce by offering employment training to individuals on skills needed to work in the nonprofit sector with a Certificate in Non-Profit Management upon graduation.
  
2. As to our **Leadership**:
  - a. **Governance**: We will continue to strengthen our board by enhancing our systems to recruit, orient, and mentor the Board.
  - b. **Human Resources**: We will also enhance our management systems to recruit, orient, mentor and assess our staff; and increase the number of staff and consultants to effectively deliver programs, so that Board members can focus on Board service and devolve from their double duty as consultants.
  
3. As to our **Administrative Operations**:
  - c. **Resource Development**: We will develop a comprehensive fundraising plan with measurable outcomes that enhances and diversifies funding streams; the plan will include revenue from government, foundations, corporations, individual donors, and special events.
  - d. **Financial Management**: We will strengthen our budgeting/accounting systems and establish a system to allocate reserves.
  - e. **Communications**: We will raise our organizational profile by developing a marketing plan that segments markets, messages, and media, and that clearly speaks to Inland Empire Community Collaborative's identity.
  - f. **Facilities**: We will address the way we use facilities, and possibly serve as a hub for other nonprofits in need of space, while considering hybrid models to provide programs both in person and online.
  - g. **Technology**: We will develop a technology plan that includes an inventory of current and future software and hardware needs, as well as protocols to ensure the security and maintenance of all hardware and electronic files/documents.

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## VISION, VALUES AND MISSION - THEORY OF CHANGE

### VISION

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The Inland Empire is more equitable, diverse, and just, through innovative, resource rich, and sustainable nonprofits.

### VALUES

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We believe in:

Centering, hearing, and respecting the voices and communities we serve

Nonprofit organizations, the backbone of society, are essential to improving the quality of life for all communities

Transparency

Integrity: We do what we say

Diversity, equity and inclusion

### MISSION

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Inland Empire Community Collaborative supports nonprofits to collectively advocate in making the region more equitable, diverse and just, through [capacity building, power building, and collaboration](#).

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## THEORY OF CHANGE

Nonprofits, as backbones of society, are essential to improving the quality of life for all communities. Nonprofits will collectively advocate for an equitable, diverse, and just society through participation in capacity building workshops, technical assistance trainings, conferences, collaboration, and nonprofit assessments.

## II. OVERVIEW

### HISTORY & LEADERSHIP: A DECADE OF STRENGTHENING LEADERSHIP

In 2010, the First 5 San Bernardino brought together a group of nonprofit leaders to support their professional development so as to ensure the success of their organizations. This “Capacity Building Academy” helped to build the participants’ leadership capacity.

From 2011 to 2014 Social Entrepreneurs, Inc. continued to offer trainings with First Five funding support. Presenters in these subsequent Capacity Building Academy workshops included previous participants – alums, who shared their expertise and lessons learned with the new incoming participants.

First 5 San Bernardino has been a leader in supporting capacity building for the nonprofit sector, having funded annual Capacity Building Academies (CBA) for nonprofit agencies since 2010. The CBA is a year-long training and education process that results in each member organization developing a sustainability plan that directly responds to the needs and priorities of their target audiences and local communities. These academies, graduating from seven to ten agencies per year, have strengthened county nonprofit organizations by focusing on sustainability planning to support the development of strong, adaptive, sustainable organizations that serve the Inland Empire.

From the agencies that participated in the initial CBA cohorts (CBA I and CBA II), the IECC was established. Having created their own sustainability plans and appreciating the value of the peer support they received through the academy structure, graduates of CBA I and CBA II, formed an informal association amongst themselves. Fourteen nonprofits representing homeless and emergency services, family support, domestic violence prevention and intervention, behavioral health supports, new parent programs, and early care and education services continued to meet beyond their involvement in the CBA to identify and act upon opportunities to support each other’s efforts. With this, the Inland Empire Community Collaborative (IECC) was established.

Seeing the value and impact of the Academy, in 2015, a group of alumni of the Academy came together to establish the Inland Empire Community Collaborative. With a start-up grant of \$32,000 and no staff, today, IECC has 4 staff, 12 Consultants, a 5-member Board, and a budget of over \$1M. Five key programs include:

1. A Capacity Building Academy with an intentional curriculum where workshops topics build upon each other and strengthen nonprofit effectiveness;
2. Ongoing Technical assistance workshops on wide ranging topics;
3. Diagnosis of nonprofits’ strengths and challenges, using TCC’s [Core Capacity Assessment Tool \(CCAT\)](#), and follow up coaching based on recommendations from the assessment;
4. A collective impact initiative, building the advocacy and collaboration capacity of children and youth serving nonprofits;

5. An Annual Conference bringing together nonprofit leaders to enhance their professional development so as to ensure they thrive;
6. With this plan, we will launch a new initiative, developing the workforce in the region, exposing underemployed, unemployed, and college students to the nonprofit sector by preparing them to core nonprofit competencies resulting in a Certificate in Non Profit Management.

## BOARD OF DIRECTORS

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A 5-member Board, chaired by David McCoy, governs the Inland Empire Community Collaborative. Board members have diverse background in social work, child welfare, and program development, evaluation, and training, marketing, administration and management education, technology and faith-based organizations. A list of current board members who participated in the planning process is in the Appendix.

## MANAGEMENT

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### **Susan Gomez Chief Executive Officer**

In September 2013, Susan Gomez became the President/CEO of the Inland Empire Community Collaborative. The Inland Empire Community Collaborative (IECC) is the result of nine years and 87 non-profit agencies working together to strengthen our organizations and improve outcomes for individuals and communities throughout San Bernardino & Riverside County. To date the IECC has collective raised over 19.2 million dollars in the last 5 years.

Susan is an alumni of California State University San Bernardino, with undergraduate degrees in Psychology and Art History and graduate studies in Rehabilitation Counseling, where she graduated Chi Sigma Iota. Her collaborative efforts include, being the co-chair of the Funder's Alliance "Inland Empire Capacity Building Network," a partner of the Inland Empire 2020 Census Complete Count Committee, and is a current member of Hispanics in Philanthropy, and the Latino Community Foundation – Los Angeles Giving Circle member and the California Nonprofit Association, as well as a member of IE Rise, Chair, Nonprofit Equity Committee. Susan is also on the board for [California Association for Nonprofits](#) and the [Caravanserai Project](#).

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## STRATEGIC PLANNING PROCESS

In a three-phase strategic planning process Board and staff came together, to analyze strengths, challenges, and develop opportunities in response to the challenges.

**PHASE 1:** Board and staff gathered information and confirmed key issues to be discussed:

- Reached consensus on issues and meeting dates
- Undertook research to assess the political, economic, demographic, and philanthropic landscape trends, their impact on IECC, and possible opportunities
- Surveyed current Board, staff, funders, and program participants, to determine their perceptions of IECC including strengths and weaknesses, and perceptions of current program priorities
- Analyzed feedback from over 40 stakeholders regarding perceived strengths and weaknesses of:
  - Programs

- Board leadership & human resources management
- Operations (e.g., facilities, fundraising, financial management, communications, technology)

**PHASE 2:** Board and staff mapped out programs' costs and benefits. This process incorporated a diversity of planning methods that included:

- Logic Model/Theory of Change
- Program cost/benefit-marketing analysis
- Appreciative inquiry of leadership and operations

Board and staff also identified strengths, challenges and opportunities for each of the organization's core areas:

- Program adaptability
- Board leadership
- Human resources need
- Administrative operations improvements

**PHASE 3:** Beginning in the Fall 2021, the Board and staff created tactical action plans to implement the Plan's broad goals and objectives. Board and staff established committees to align with the Strategic Plan priorities.

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## COMPETITIVE ADVANTAGE/DIFFERENTIATION

As part of the planning process Board and staff identified other organizations offering similar programs and services, and discussed how Inland Empire Community Collaborative is better, different, or unique as compared to these organizations in the following core areas: programs, governance, staff, and location. This discussion helped to further inform our planning process. We identified the following ways in which we are at an advantage and can successfully implement this Plan:

- **Governance:** Our board is local, engaged and committed. Their wide diversity of skills, especially on the nonprofit sector, guides IECC to ensure our continued effectiveness and growth.
- **Staff:** The small, but knowledgeable and engaged staff, with a dynamic Executive Director, ensures that nonprofit leaders receive excellent and effective programs.
- **Programs:** An array of programs fulfill gaps from other management support organizations, and aim to increase the leadership and organizational capacity of program participants.
- **Resource Development:** Funders' trust in our ability to deliver programs has resulted in an increase over a 100% of our income, jumping from a budget of \$25,000 when we started in 2017, to a budget of \$1.5M today, and a myriad of private foundations seek us out to partner with us.

### III. PROGRAMS

#### PROGRAM INNOVATIONS

Since 2010, when the first cohort of leaders met under the sponsorship of First 5 San Bernardino, we have been committed to the belief in the power of nonprofit organizations to strengthen our community. Our menu of programs provides unique and innovative opportunities to learn about, and benefit about nonprofit core capacities.

**Moving forward** we will embed in all of our programs information to ensure that non profits have the tools to engage in **systems-change advocacy**. More specifically we will:

1. **Enhance** our key signature programs as detailed below and improve their evaluation to show impact\_
  - a. The Capacity Building Academy
  - b. Technical Assistance workshops
  - c. Core Capacity Assessments
2. **Streamline** our annual Thrive Academy
3. **Support advocacy-focused collective impact collaborations**, when requested by organizations with similar missions e.g. youth, women, children.
4. **Partner** with University of California Riverside to increase and develop the workforce of individuals interested in serving in the non profit sector through the establishment of a Non Profit Certificate program\_

As to **all** of our programs, we will ensure greater impact by **improving mechanisms to evaluate and measure** our impact;

By employing a variety of strategic objectives, as described below, we are confident that Inland Empire Community Collaborative will have considerable impact on the leaders and nonprofits we serve. A Gantt Chart/ Operating Plan will be developed to guide decision-making and funding.

**Capacity Building Academy**

Participants in the Capacity Building Academy attend monthly workshops from October through June. Organizations assemble a team of 2 to 5 participants to participate in the Academy. Key team members could include e.g., the board treasurer or bookkeeper/accountant who can attend the sessions aimed at and relevant to their role such as board governance or strategic financing. Graduates completing the Academy complete a sustainability plan and make a presentation to a funders panel at First 5 San Bernardino and are also eligible to participate as members of IECC.

For the next three years, we will work to better integrate curriculum topics, so that topics build knowledge incrementally, to ensure that the Academy can have the greatest impact on participants' nonprofit effectiveness and sustainability. **Moving forward**, we will enhance our training curriculum and achieve the following milestones within three years.

**2021-2022**

1. Develop a capacity building curriculum for new workshops that includes skill and practice in meeting with key champions. e.g. Add in an advocacy component to the curriculum.
2. Require that the CCAT be taken by any organization that plans to do capacity building through the Academy as this will provide some insight into the organization's needs.
3. Before attending the Capacity Building Academy an organization should be assisted by a coach for a specific period to ensure that they are addressing their own needs that have been identified in the CCAT.
4. Based on this new evaluation tool (CCAT) prior to participants joining CBA, conduct a post evaluation survey upon completion to create longitudinal data, 6 months out and develop annual to check on alumni 12 months out.
5. Develop hybrid workshops with both in person and virtual workshops to ensure accessibility.
6. Intentionally "Lay the seeds" of developing, cultivating, engaging more IECC members to become facilitators/coaches.
7. Develop a pool of facilitators with specific expertise to facilitate workshops depending on the new curriculum. e.g. Charity Agar regarding strategic financing.
8. Embed DEI lens in all curriculum and facilitation workshops.

**2022-2023**

1. Prepare a report comparing aggregate scores pre and post for CBA Cohorts to measure impact.
2. Continue to develop, cultivate, and engage more IECC members to become facilitators/coaches.
3. Continue to embed DEI lens on curriculum and facilitation CBA. Embed DEI lens on curriculum and facilitation CBA.
4. Increase the number of staff needed to implement CBA.
5. Consider tracks to segment participants new, then intermediate, then advanced workshops, based on the original mission/goal of CBA.

**2023-2024**

1. Continue to develop, cultivate, and engage more IECC members to become facilitators/coaches.
2. Continue to embed DEI lens on curriculum and facilitation CBA. Embed DEI lens on curriculum and facilitation CBA.

### **Technical Assistance Workshops**

Technical Assistance (TA) workshops and trainings offer nonprofit organizations in the Inland Empire help in learning not only how to work better in this new work-from-home environment, but to also build capacity by leveraging financial resources, and improve core operations. Ongoing trainings include sessions on e.g., Diversity, Equity and Inclusion (DEI), insurance, grant development, and systems-change advocacy.

For the next three years, we will work to better integrate our Capacity Building Academy workshops with ongoing Technical Assistance classes. **Moving forward**, we will enhance our training curriculum and achieve the following milestones within three years.

#### **2021-2022**

- 1. *Conduct research on diversity equity data related to funding in region***
- 2. *Based on research, develop tool kit so non profits can advocate for themselves***
- 3. *Provide topical workshops on topics such as applying for PPP loans, The Census, Redistricting***

#### **2022-2023**

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## CORE CAPACITY ASSESSMENTS

The Core Capacity Assessment Tool (CCAT) is an online, survey-based tool designed to collect information from key decision-makers in nonprofits organizations. Based on responses from multiple stakeholders in the organizations, the Tool then creates prioritized recommendations for building organizational capacity. The CCAT is a leading assessment tool for measuring a nonprofit's effectiveness.

As a certified CCAT facilitator of the Tool, IECC administers and interprets the Tool's report findings based on responses from an unlimited number of respondents within a single organization. **Moving forward**, we will enhance our service to nonprofits to help them diagnose their strength as well as areas for improvement and we will achieve the following milestones within three years.

### 2021-2022

1. Develop a complete Implementation Plan that accompanies the CCAT for each individual organization that completes one.
2. Require that the CCAT be taken by any organization that plans to do capacity building work with IECC through the Academy as this will provide some insight into the organization's needs.
3. Before attending the CBA an organization should be assisted by a coach for a specific period of time to ensure that they are addressing their own needs that have been identified in the CCAT.

### 2022-2023

1. Develop ways to market the CCAT to small organizations who would be willing to invest the money in taking it. This will help them truly learn about their organization's needs, diversified grant funding will offer scholarship opportunities for smaller nonprofits.
2. Continue to offer an implementation plan to move forward efforts to improve CCAT results.
3. Develop tools to measure impact of the CCAT and implementation plan on the organization to get longitudinal information regarding impact.
4. Two-year CCAT post surveys will be included to assess longitudinal data and collective impact.

### 2023-2024

1. Continue to enhance ways to market the CCAT to small organizations who would be willing to invest the money in taking it. This will help them truly learn about their organization's needs, diversified grant funding will offer scholarship opportunities for smaller nonprofits.
2. Consider IECC offering additional services/supports in areas such as board development etc. that would be offered for a fee to participants.
3. Includes two-year CCAT post surveys to assess longitudinal data and collective impact.

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## COLLECTIVE IMPACT COALITION BUILDING ADVOCACY

We will explore expanding our service as the backbone/anchor to support collaborations of organizations with similar missions, e.g., those advocating for people experiencing homelessness, or women, children, youth. We will serve as the backbone and provide leadership support only if voluntarily requested from within participating partners. **Moving forward**, based on lessons learned, explore how continue to serve as a backbone to future collaboratives. We will achieve the following milestones within three years.

### **2021-2022**

We will phase out FCSP-E (now FCIE)

1. Assess our outcomes to date and adjust our service delivery to ensure long term success.
2. Define services we can continue to offer to the group until they are self-sufficient.

### **2022-2023**

3. Assess the impact we already made in the community.
4. Immediately get data from FCSP-E (FCIE) members to demonstrate impact and use in grants, outreach and marketing plans.
5. We will explore the development of Collective Impact Power Building Collaboration models based on specific areas of service with focus on agencies seeking it, not mandated to it. We will explore as to whether the collaborative will be skills development vs coalition building and if the latter, ensure coalition building is voluntary.

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## NON PROFIT WORKFORCE DEVELOPMENT CERTIFICATE PROGRAM

Our region, like other parts of the country has individuals who are unemployed or underemployed. At the same time, nonprofits need trained staff to provide services to their clients. To address these dual needs, in partnership with other organizations, we will provide training on nonprofit areas such as overview of nonprofits, Board leadership, human resources management, fundraising, financial management so as to develop the region's workforce and develop a pipeline of trained professionals. **Moving forward, we will grow launch this our programs for the next three years.**

### **2021-2022**

1. Develop and enhance curriculum for each track of the program with a focus on advocating for diversity, equity and inclusion in all parts of the organization: Board, Staff, Programs, and Operations
2. Hire instructors to teach in each track.
3. Develop evaluation tools to measure impact during future attendance e.g., CCAT

### **2022-2023**

3. Secure future funding to expand the participation of other organizations.
4. Implement evaluation tools to measure impact during future attendance.

### **2023-2024**

4. Implement evaluation tools to measure impact during future attendance.

#### IV. GOVERNANCE

Inland Empire Community Collaborative's governance strengths include an engaged, hardworking Board with diverse skills, all of whom are dedicated to the mission. Although Board members represent the different sectors of the nonprofit community, they all agree on a shared vision, work well with each other and unconditionally respect, value, and support each other's thoughts and opinions. **Moving forward**, we will strengthen board governance by enhancing systems to recruit, orient, and mentor the Board, achieving the following objectives in the next three years:

##### 2021

- Develop a strengths and gaps analysis and recruit board members with needed skills
- Grow the board and set tiered board structure with board engagement
- Update bylaws to include terms of office/succession
- Develop sub committees in the By laws e.g. Finance Committee
- Conduct Board elections
- Develop policy to clarify board conflicts of interest

##### 2022

- Ensure follow through with promised due dates
- Train Board on technology and provide ongoing support
- Engage CBA alumni and intentionally target members about new opportunities to engage with IECC e.g., the Board, Board Committees, programs facilitators, forum
- Develop Committee Charters and workplans for all the Committees

##### 2023

- Implement succession plan for board as per the By Laws

## V. HUMAN RESOURCES

Human Resources strengths include a hardworking, well organized, efficient, dedicated, responsive team. The adaptable teamwork and great communication between staff daily for small and for larger issues results in excellent programming and administration. The Chief Executive has extensive contacts with funders, government, and other management support organizations, based on her many years and diverse professional background in nonprofit management. **Moving forward**, we will strengthen human resources operations by achieving the following objectives within the next three years with a focus on systems to recruit, orient, and mentor staff:

### 2021

- Assess organizational needs
- Develop Job positions needed and develop an Org Chart with staff involvement/input
- Target the hires to people with specific skills
- Hire people other than Board to broaden pool of consultants
- Budget for and contract with grant fund development P /T consultant

### 2022

- Develop All HR Staffing policies, procedures manual with descriptions of Benefits, including virtual staff costs, hiring procedures.
- Develop Board and Staff evaluation
- Develop policy to clarify board conflicts of interest when also doing the work as contractors
- Engage CBA alumni and intentionally target members about new opportunities to engage on e.g. Board Committees, programs, forum
- Strengthen communication systems between board and staff (goals and outcomes) e.g., through written documentation/policies rather than verbal
- Develop staff cross training

### 2023

- Develop a succession plan for all key staff to include the mentoring of the identified staff. Include long-term and emergency/short-term situations.
- Implement annual staff performance assessments. Clarify the benchmarks to evaluate staff performance.

## VI. RESOURCE DEVELOPMENT

Inland Empire Community Collaborative's resource development strengths include a Chief Executive Officer and consulting development officer who are good fundraisers; growing and diverse funding streams, including a government as well as diverse pool of foundation support; a history of supportive and ongoing past funders.

**Moving forward**, we will strengthen resource development during the next three years with a focus on increasing support from diverse streams.

### 2021

Develop Strategic Fundraising/Financing Plan to be intentional on programs and funding we receive  
Budget for and contract with grant fund development P/T consultant  
Increase the number of staff/volunteers with the skills needed to raise funds from individuals.

### 2022

Continue to increase the number of staff/volunteers with the skills needed to raise funds from individuals.  
Increase the number of staff/volunteers with the skills needed to raise funds from the government, corporations, and foundations.  
Develop a 3-year Fund Development Plan  
Purchase a CRM software - Donors Database System

IECC seeks additional earned and contributed income to fulfill its mission. Specifically, topline projections of income and expenses over the next three years include incremental increases in revenue consistent with projected growth related to programming and staffing:

	<b>FY2020</b>	<b>FY2021</b>	<b>FY2022</b>	<b>FY2023</b>
Total Revenue	591,000	1,000,000	\$1,500,000	\$2,000,000
Total Expenses	459,000	955,000	\$1,340,000	\$1,805,000
Net Income/Surplus	<b>42,000</b>	<b>45,000</b>	<b>160,000</b>	<b>195,000</b>

## VII. FINANCIAL MANAGEMENT

Financial management systems include a ongoing improvements in our budgeting and accounting P/T staff and software. **Moving forward**, we will strengthen financial management systems by achieving the following objectives in three years:

### 2021

Develop a Strategic Fundraising and Financing Plan to be intentional regarding the funding we receive for the programs we deliver  
Look for funding to have a Fund Development Plan and a Grant Development Consultant  
Build our internal fiscal systems and policies to manage multiple projects  
Improving and augmenting our accounting and fiscal control for multiple projects  
Ongoing training for staff and board

### 2022

Look for funding and complete a formal audit for IECC  
Develop a fiscal compliance calendar  
Hire staff or consultants for accounting and fiscal support  
Provide ongoing training for staff and board  
Develop a year-end report

### 2023

Look for funding and complete a formal audit for IECC  
Develop a year-end report  
Ongoing training for staff and board

## VIII. MARKETING & COMMUNICATIONS

Communication strengths include an outstanding website providing great visibility. Our reach has expanded exponentially including interest outside of Northern California. A Google Ad grant allows us to effectively maximize our communications. **Moving forward**, to ensure that our message focuses on our unique value, we will improve our marketing with a focus on assessment, identifying markets audiences, increasing communications budget, and enhancing social media strategies during the next three years:

### 2021

- Develop a comprehensive marketing plan with budget
- Develop an Annual Impact report
- Create testimonials from alumni, on website, videos
- Review moderator policies as to how to Promote Facebook Forum

### 2022

- Create Emergency Action Plan e.g., internet, communication during a disaster
- Hire a part-time student, intern, or consultant to assist on social media and website management (graphic designer, press releases, email marketing, and google Ad Grant)

### 2023

- Increase the number of staff/consultants/volunteers with marketing skills.
- Scrub database and segment stakeholder database

## IX. FACILITIES

### FACILITIES STRENGTHS

Our facilities strengths including successful pivot to online learning for all our programs. **Moving forward**, we will improve administrative facilities by achieving the following objectives within the next year:

1. Explore possible Shared Space
2. Get a PO Box
3. Get a dedicated phone number

## X. TECHNOLOGY

Technology strengths include Board (Doug) and skilled staff (Brian and Claudia) who support the rest on technology needs. Both hardware good laptops and up to date technology systems are in place **Moving forward**, we will strengthen technology systems by achieving the following objectives during the next year:

1. Assess our hardware and software needs
  2. Conduct ongoing training for staff / Board and staff as needed
  3. Provide ongoing support to the staff / Board
  4. Scrub the database and segment stakeholder by type e.g., CAB alumni IECC member, Board, donor, funder, media, etc.
- 2022
5. Obtain Esri ongoing license
  6. Obtain Ongoing Esri training

## IMPLEMENTATION

As we transition into the implementation phase and begin to carry out this Plan, its overall effectiveness is dependent upon our level of organizational learning: reflecting on what is really working, being open to new information, and acting mindfully to adjust to changing circumstances.

In support of these practices, the three-year strategic plan will be monitored and evaluated regularly at Board meetings and at staff meetings to benchmark performance and progress; Annual Operating Plans (AOPs) will be developed to guide short-term decision-making and funding.

## APPENDIX

- A. Strategic Planning Committee
- B. List of Board
- C. List of Staff
- D. Theory of Change Worksheet (Worksheet to be deleted after Strategic Planning Committee reviews)
- E. Vision, Values and Mission Statement worksheet (Worksheet to be deleted after Strategic Planning Committee finalized the three statements)

Strategic Planning process facilitated by  
Fernando Chang-Muy  
Solutions International  
[fchangm1@upenn.edu](mailto:fchangm1@upenn.edu)  
Spring 2021–Fall 2021

Board: David McCoy, Nancy Stingley, Megan Meadors, Mary Frame, Dr. Doug Perkins

Staff: Susan Gomez, Brian Romo, Claudia Montoya

David McCoy, President  
Chief Executive Officer  
A Coming of Age Foster Family Agency

Megan Meadors, Vice President  
Marketing Director  
Bear Valley Community Healthcare District (BVCHD)

Mary Frame, Treasurer  
Director of Quality Assurance  
Walden Family Services

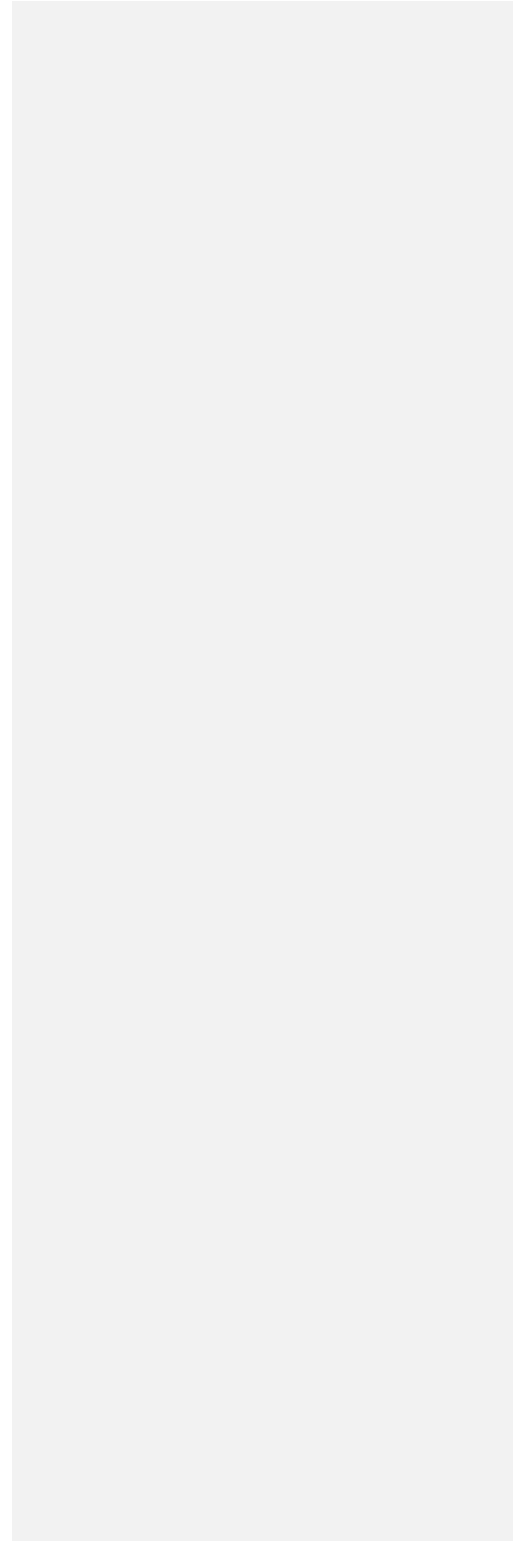
Nancy Stingley, Secretary  
Former educator and Founder of Nana's Academy

Dr. Douglas Perkins, Board Member  
Pastor (Administrator)  
Agape Community Christian Church (A.I.M)

Susan Gomez, Chief Executive Officer

Claudia Montoya, JD, Program Coordinator

Brian Thomas Romo, MPP, GIS and Data Management Associate



**THEORY OF CHANGE WORKSHEET**

**Target Populations**

<b>Program</b>	<b>Outcome Meaningful, Plausible, Do-able, Testable</b>	<b>Target</b>
Capacity Building Academy Thrive Conference	Network Strengthened; Opportunities shared for specific industries; trainings organized Conducive/friendly environment created,	Current and IECC alum nonprofit providers, some of whom are led by people of color, who support diversity of communities such as homeless, children and families, youth in foster care
Capacity Building Academy Thrive Conference Technical Assistance Training CCAT implementation and follow-up trainings	Core capacities infrastructure processes developed established, improved, and sustained; Collaboration and community advocacy strengthened	Small/new/emerging nonprofits, including faith based organizations that have community outreach and engagement, challenged to improve, in California, IE region
FCSP	Coalition built and collaboration among participants together to become self sufficient	leaders, funders, policy makers
Workforce Dev Certificate Program	Job seekers connected to job opportunities in nonprofit sector	Job seeker/unemployed/underemployed

