



# Strategic Plan

2024 – 2027

February 17, 2024

La Quinta, California

## **Participants**

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- Sarah Marschall
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## Executive Summary

On February 17, 2024, members of the Inland Empire Community Collaborative, including staff, board, and consultants, gathered to craft a three-year strategic plan for the agency. The session was led by Becky Foreman, a certified facilitator, using a process called Technology of Participation. This methodology is designed to ensure every voice is heard and all ideas honored.

The planning was guided by a “focus question”, developed in advance, which described the most pressing needs of the agency moving forward. Throughout their time together the team created a practical vision, describing what they would like to see in place in three years, brainstormed about what they would like to celebrate one year into the journey, took an honest look at their current reality, and came to consensus on ten specific commitments to be accomplished within the first twelve months of the plan.

The group demonstrated camaraderie and respect for each other as they worked together. They expressed appreciation for being able to spend time together and gain a deeper understanding of everyone’s roles and how they fit together. A continuing theme that emerged throughout the conversation was the appreciation everyone had for the commitment, passion, and expertise of the IECC staff.

In the focus question, the group was charged with thinking about ways to deal with the challenges that come with change, and to best utilize the many new opportunities that have arisen. In their time together they answered that question through thoughtful, often robust, conversation and came to consensus with good humor and enthusiasm. The results of their planning are in this document.

Becky Foreman, Facilitator



## Focus Question

How can we, as the Inland Empire Community Collaborative, over the next three years manage our growth while pursuing new opportunities, build sufficient staff and resources to meet the growing demand for our services, and create the infrastructure that will enable us to meet coming changes and transitions thoughtfully and proactively?

## Practical Vision

*What do we want to see in place in three years as a result of our actions?*

Shared Physical Space for Nonprofits	Long-Term Security of IECC	Strong, Standardized Internal Systems	Visible Impact on the IE Nonprofit Sector	Fully Supported Staffing Structure	Effective, Equitable and Responsive Capacity Building	Local Fiscal Sponsor for a More Equitable IE	Strong Backbone for Nonprofit Advocacy & Policy
<ul style="list-style-type: none"> <li>• Own facility</li> <li>• IECC has own space, shared</li> <li>• IECC maintains its own dedicated office space (staff &amp; community Riverside &amp; San Bernardino)</li> <li>• Co-owned Nonprofit Alliance</li> </ul>	<ul style="list-style-type: none"> <li>• CEO succession plan in place</li> <li>• Clear succession plan</li> <li>• Endowment for IECC</li> </ul>	<ul style="list-style-type: none"> <li>• Standardization of tech</li> <li>• Complex processes automated</li> <li>• Adopted a new financial system</li> <li>• Ongoing internal training</li> <li>• Trainings for staff and board (tech)</li> </ul>	<ul style="list-style-type: none"> <li>• Research base needs of community</li> <li>• Strong, vibrant network with IECC in the center</li> <li>• Reevaluate programs and delivery of services</li> <li>• IECC known in wide variety of nonprofit sectors</li> <li>• Technology leader for nonprofits</li> <li>• Workplace pipeline (with universities) for nonprofit sector</li> <li>• Shared bargaining power (HR, payroll, audits, benefits, 401k)</li> <li>• People know the story and impact of IECC</li> <li>• Greater impact in underserved areas</li> <li>• Year end report, evaluation</li> </ul>	<ul style="list-style-type: none"> <li>• Fully staffed to meet project needs</li> <li>• 6-8 FTEs in place</li> <li>• Full time grant writing, developer</li> <li>• Marketing infrastructure</li> <li>• Structured compensation policy</li> <li>• IECC team with flow and less stress – spaciousness to innovate, create</li> <li>• New staff working in dedicated departments</li> <li>• Updated job descriptions</li> <li>• Shared staff working model</li> <li>• In-house bookkeeping &amp; HR</li> <li>• Full team project leads</li> </ul>	<ul style="list-style-type: none"> <li>• CBA-2, advanced best practices</li> <li>• 2 CBA graduates</li> <li>• First CBA cohort fiscal sponsored, nonprofits of color</li> <li>• CCATS are instrumental for all nonprofits to assess themselves</li> <li>• 100 new partners</li> <li>• Clarify IECC membership</li> <li>• Repository of toolkits and resources</li> <li>• CBA cohort on listening &amp; amplifying lived experience</li> <li>• Updated Learning and Eval toolkit</li> </ul>	<ul style="list-style-type: none"> <li>• IECC is fiscal sponsor to nonprofits (incubator)</li> <li>• IECC steward of money</li> <li>• IECC leads collaborative grant getting in IE</li> <li>• IECC Capacity Building Fund</li> </ul>	<ul style="list-style-type: none"> <li>• IE Children’s Cabinet is “go to” for all sectors</li> <li>• Designated funding for kids’ “ballot”</li> <li>• Children’s Cabinet fully funded for next 5 years</li> </ul>

## Victory

*What would we like to celebrate in one year?*

Hired new staff

New physical space

IECC CBA graduation

Curriculum for CBA 2 is created

Name recognition (nonprofit leaders know who IECC is)

New unrestricted, diversified funding

Cohort of fiscal sponsorship identified

Succession plan

Financial system in place

Effectively advocated for one policy

Year-end report

New partners

Have defined, clarified membership



## Current Reality

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• <b>Good reputation</b></li> <li>• <b>Inclusivity</b></li> <li>• <b>Staff have high standards</b></li> <li>• <b>Board wants to be involved</b></li> <li>• <b>Culture is non-competitive</b></li> <li>• <b>Cohesion among staff and board</b></li> <li>• <b>Strong, positive relationships among staff and board</b></li> <li>• <b>Good culture that starts at the top</b></li> <li>• <b>Extremely knowledgeable and capable staff</b></li> <li>• <b>Staff are SMEs</b></li> <li>• <b>Staff are passionate and compassionate</b></li> <li>• <b>Pool of unrestricted funds</b></li> <li>• <b>Exceptional connections and relationships allow IECC to be proactive, not reactive</b></li> </ul>	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Fiscal sponsors for CBA</li> <li>• Embed CBAs and CCATS into funding</li> <li>• Build Children’s Cabinet</li> <li>• Build staff, internal capacity</li> <li>• “Streamline” CBA for specific projects</li> <li>• Fiscal sponsors (funding available, Weingart and Cal Endow in process)</li> </ul>
<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Not enough staff</li> <li>• Need for redefined roles</li> <li>• Growth presents challenges in staffing</li> <li>• Lack of a succession plan</li> <li>• No funding for CBAs</li> <li>• Focus shifts depending on funding</li> <li>• Limited knowledge in some areas</li> <li>• Overly reliant on grants</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Lack of clarity on how fiscal sponsorship will work</li> <li>• Loss of IECC identity</li> <li>• Scope of board’s fiduciary responsibilities could skyrocket</li> <li>• Political change</li> <li>• IECC could become a target with perception of preferential treatment</li> <li>• New staff not meshing with culture</li> <li>• Difficult to balance everything</li> <li>• Relying solely on grants</li> </ul>



## Commitments

*What are we committed to accomplishing over the first 12 months?*

- Create clear definition of membership
- Financial system in place
- Hire 2 new staff
- Create a succession plan
- Create a plan for securing a building
- Update CBA curriculum
- Identify new CBA cohort
- Advocate for one policy
- Develop a plan to increase name recognition
- Have a year-end impact report

## Strategic Directions



Strengthening our  
Infrastructure



Defining our Service Lines



Communicating Impact

## Calendar of Commitments by Completion Quarter (\* indicates lead person)

	Q1 April - June	Q2 July – Sept.	Q3 Oct. – Dec.	Q4 Jan. - March
Strengthening our Infrastructure	<ul style="list-style-type: none"> <li>• Create clear definition of membership (*Board)</li> </ul>	<ul style="list-style-type: none"> <li>• Financial system in place (*Claudia, Doug)</li> </ul>	<ul style="list-style-type: none"> <li>• Hire two new staff (*Suzie, Claudia)</li> <li>• Create a succession plan (*Sarah Boxx)</li> </ul>	<ul style="list-style-type: none"> <li>• Create plan for securing a building (*Malek, David, Mary)</li> </ul>
Defining our Service Lines	<ul style="list-style-type: none"> <li>• Update curriculum (*Brian, Megan)</li> </ul>	<ul style="list-style-type: none"> <li>• Identify new CBA cohort (*Suzie, Megan, David)</li> </ul>	<ul style="list-style-type: none"> <li>• Advocate for one policy (*Brian)</li> </ul>	
Communicating Impact	<ul style="list-style-type: none"> <li>• Develop a plan to increase name recognition (marketing) (*Reina, Clara, Brian, Malek)</li> </ul>	<ul style="list-style-type: none"> <li>• Have a year-end Impact Report (*Sarah, Mary, Brian, Claudia)</li> </ul>		



## Tips for Keeping Your Plan On Track

- Identify who is the overall coordinator of the plan.
- Have a coordinator for each Accomplishment.
- Develop an implementation plan for each Accomplishment as soon as possible.
- Schedule regular progress reports.
- Build accountability, coordination and reporting into existing meetings.
- Create spontaneous celebrations when actions are completed.
- Hold a 3-month and 6-month evaluation & refinement session.
- Hold an end-of-year planning session for the subsequent year.

## 90-Day Implementation Steps Worksheet

<b>Project</b>			<b>Accomplishment/ Action Title</b>	
<b>Intent: (why)</b>			<b>Start Date:</b>	<b>End Date:</b>
<b><u>Implementation Steps (how)</u></b>		<b><u>Who</u></b>	<b><u>When</u></b>	<b><u>Where</u></b>
<b>Coordinator:</b>  <b>Team Members:</b>	<b>Collaborators/ partners</b>	<b>Evaluation Measures</b>	<b>Budget</b>	<b>Next Meeting Date:</b>  <b>Place:</b>  <b>Time:</b>