Inland Empire Community Foundation
where giving grows

BOARD OF DIRECTORS MEETING

Zoom Link

March 9, 2026

4:00 PM – 6:00PM

Inland Empire Community Foundation
where giving grows

Vision

A vibrant, generous, and just region – with unlimited opportunities.

Mission

Strengthening the Inland Empire through Philanthropy.

We achieve this by:

Raising assets: We partner with exemplary individuals, families and others who care passionately about im-proving the community and create permanent charitable funds.

Stewarding assets: We invest and administer charitable assets based on a set of rigorous national standards.

Distributing assets: We make grants to nonprofit organizations that are doing important work in health and human services, youth and families, arts and culture, education – and for civic and environmental benefit.

Community leadership: We serve as a convener by bringing together key stakeholders to determine commu-nity needs; we facilitate the development of collaborative solutions to important community issues; and we act as a catalyst for positive change.

Values

The Community Foundation is committed to the following as essential to our success. To our donors, stakeholders and to one another we make the following commitments:

Integrity—An abiding pledge to trust, honesty, professionalism, civility and respect.

Inclusion—We believe that philanthropy should mirror the people whom we serve. Diversity and equity are essential to the fullest realization of our ideas and endeavors.

Excellence—In our every endeavor.

Collaboration—Working together as a team, for no one person or organization can address the com-munity's many needs.

Knowledge—We strive to be a source of knowledge for the regions we serve. To exemplify this we consistently train and educate our Board and staff in order to better serve our donors and constituents.

Inland Empire Community Foundation
where giving grows

UPCOMING EVENTS

March

2026 Women's Giving Fund Spring Fling

Date: Sunday, March 22, 2026 Time: 11:00 AM – 2:00 PM Location: Omni Rancho Las Palmas 41000 Bob Hope Dr, Rancho Mirage

April

IE Faith-Based Affordable Housing Tour

Date: Friday, April 17, 2026
Time: 8:00 AM – 5:00 PM
Location: IECF

August

Policy & Philanthropy Summit

Date: August 5-6, 2026
Location: Riverside Convention Center

Board of Directors Meeting

March 9, 2026

Agenda – Zoom Call

Zoom Link

4:00 PM – Call the Meeting to Order Mr. Jesse Melgar

4:01 PM – Welcome and Introductions Mr. Jesse Melgar

- Jack Fitzsimmons, Philanthropist
- Daniel Little, Chief Intergovernmental Affairs Officer, Yuhaaviatam of San Manuel Nations
- Marisa Yeager, Associate Vice President, Office of Government, Tribal & Community Relations, CSUSB

4:10 PM – Consent Agenda Mr. Jesse Melgar

The following items are presented for approval, and will be acted upon without discussion. Any Board Member may request, prior to or during the meeting, that an item be removed for separate consideration:

- Board Meeting Minutes – January 12, 2026
- All Grants Distribution Approval – December 2025 and January 2026
- Inland Empire Black Equity Fund (BEI) – Proposed Name Change
- Catholic Charities San Bernardino & Riverside Counties – Proposed Name Change

Action: Approval Required

4:15 PM – Investment and Financials Mr. Brian McDonald

- Investment Flash Report – February 2026 Mr. Neal Waner
  - Will be shared at the meeting
- January 2026 Financials Mr. Brian McDonald
  Action: Approval Required
- Increasing Fixed Assets & Prepaid Assets Limit Mr. Brian McDonald
  Action: Approval Required

4:40 PM – President & CEO Report Ms. Michelle Decker

- CIO Position Update
- 85th Campaign Update

- Policy Update – Foundations On The Hill
- IE Journalism Hub – Jesse Melgar
- Am I Next Campaign
    - Am I Next Campaign Link

5:20 PM – Committee Reports & Discussion Mr. Jesse Melgar

- Board Governance Committee Mr. Jesse Melgar
    - New Board Portal Update
    - Board Orientation/Draft Agenda
- Executive Committee Meeting Mr. Jesse Melgar
    - Executive Committee Minutes – December 8, 2025
      Action: Approval Required

5:45 PM – Chair Report Mr. Jesse Melgar
6:00 PM – Meeting Adjourned Mr. Jesse Melgar

Review Items

- Charitable Giving, Donor Services, and Marketing Team Updates
- Office of Policy and Engagement Report
- Programs and Community Impact Report
  No Action Required | Information Only

Inland Empire Community Foundation
where giving grows

Consent Agenda

Board of Directors Meeting Minutes

January 12, 2026

Attendance

Board Members Present: J. Melgar, J. Williams, N. Long, B. McDonald, B. Nate, F. Alexander, J. Mejia, L. Monville, N. Waner, R. Lewis, P. Ellis, E. Romero
Board Members Absent: L. Andriani, J. Williams
Emeritus Chair: S. Bohon
Guest: Carrie Harmon (IEGO)

4:00 PM – Call the Meeting to Order Mr. Jesse Melgar

Board Chair Jesse Melgar called the meeting to order at 4:04 PM.

4:01 PM – Welcome and Introductions Mr. Jesse Melgar

Mr. Melgar welcomed Patrick Ellis to his first Board of Directors Meeting and would like to schedule a one-on-one. Mr. Ellis provided a brief introduction and background to the Board.

4:05 PM – Consent Agenda Mr. Jesse Melgar

The following items are presented for approval, and will be acted upon without discussion. Any Board Member may request, prior to or during the meeting, that an item be removed for separate consideration:

- Board Meeting Minutes - November 10, 2025
- All Grants Distribution Approval – October and November 2025
- Leonard Family Scholarship – Change of Purpose
- 2026 Spending Policy

Action: M/S/C (N. Long / L. Monville) – The Board unanimously approved the Consent Agenda as presented.

4:10 PM – Investment and Financials Mr. Brian McDonald

- Investment Flash Report – December 2025 Mr. Neal Waner
  Mr. Waner presented the December 2025 Investment Flash Report and Provided an overview of year-end performance. Mr. Waner mentioned it was a good year.
- Investment Committee Minutes - November 13, 2025 Mr. Neal Waner
  Action: M/S/C (N. Waner / B. McDonald) – The Board approved the Investment Committee Minutes as presented.

- November 2025 Financials — Mr. Brian McDonald

  Ms. Khyati Mehta presented the November 2025 financial statements and reported that the profit and loss statements reflect favorable performance. Ms. Mehta provided a brief update on the Nonprofit Loan Fund, which officially launched on December 1, 2025, with loan amounts ranging from $100,000 to $400,000.

  Action: M/S/C (J. Mejia / N. Waner_ - The Board approved the November Financial Statements as presented.

4:30 PM – President & CEO Report — Ms. Michelle Decker

- EOY Board Giving Results

  Ms. Decker provided a comprehensive review of 2025 accomplishments and outlined strategic goals and priorities for 2026.
- 2025 Review & 2026 Goals and Objectives - CEO and Teams

  Mr. McDonald highlighted the success of the Policy & Philanthropy Summit and noted important shifts in the direction of philanthropy. Ms. Decker acknowledged the strength and effectiveness of the Policy Committee.

  Ms. Long noted the positive alignment between the Vital Conditions Network (VCN) and Community Funds as a significant organizational advancement.

  Ms. Alexander shared that, as a new Board Member, she appreciated the organization's measurable growth and valued the ability to clearly track its progress and success.

  Mr. Melgar commended the Legislative Roundtables, noting their effectiveness in engaging diverse staff members and recognizing the contributions of Graciela Jacob and her team.

  Mr. Waner referenced John Kobara's expertise and insight regarding philanthropic trends.

  Mr. Mejia emphasized a consistent theme of growth, referencing the Governor's Forum, the Foundation's expanding statewide presence, and the Legislative Roundtables.

Mr. Waner inquired about the Request for Proposal (RFP) process related to Relationship Manager contracts and whether a formal review cycle policy exists. Mr. Bohon responded that reviews occur approximately every five years and indicated the process may warrant further refinement.

Mr. McDonald inquired about the development of an Artificial Intelligence (AI) policy, including which committee would oversee the effort (e.g., IT Committee).

Mr. Mejia acknowledged recent appointments by Governor Newsom involving Jesse Melgar and Paulette Brown-Hinds, noting the recognition as a testament to their leadership.

M/S/C (B. McDonald / J. Mejia) – The Board unanimously approved the formulation of formal letters regarding gubernatorial appointments.

4:50 PM – Committee Reports & Discussion — Mr. Jesse Melgar

- Board Governance Committee — Mr. Jesse Melgar
  - Matrix Criteria
  - Approval of Board Member Candidate – Marisa V. Yeager
  - Approval of Board Member Candidate – Daniel Little

- Approval of Board Member Candidate – Jack Fitzsimmons

Action: M/S/C (B. McDonald / N. Long) – The Board Unanimously approved the election of Marisa Yeager, Daniel Little, and Jack Fitzsimmons to the Board of Directors.

- Appointment of Chair of Charitable Giving and Marketing Committee – Rosie Lewis

Action: M/S/C (L. Monville / N. Long) – The Board unanimously approved the appointment of Rosie Lewis as Chair of the Charitable Giving and Marketing Committee.

- Charitable Giving and Marketing Committee
  - Four In-House "Out in the IE" Funds
    - "Out in the IE" LGBTQ+ Fund
    - "Out in the IE" LGBTQ+ Endowed Fund
    - "Out in the IE" LGBTQ+ Scholarship Fund
    - "Out in the IE" LGBTQ+ Scholarship Endowed Fund

Action: M/S/C (E. Romero / J. Mejia) – The Board unanimously approved the establishment of the four Out in the IE" in-house funds as presented.

5:20 PM – Presentation Ms. Michelle Decker

- IEGO Updates – Carrie Harmon

  Mr. Monville provided an introduction of Ms. Carrie Harmon and shared a brief overview of IEGO's history and its regional role. Ms. Harmon presented updates on the following strategic focus areas:
  - Workforce and Career Technical Education (CTE) Alignment
  - Hydrogen Ecosystem Development
  - Clean Energy Business Attraction
  - Regional and Agency Engagement
  - Workforce and Industry Advisory Initiatives
  - Capital Access and Private Sector Engagement
  - Regional Investment Initiative (RII) Application Status

5:45 PM – Chair Report Mr. Jesse Melgar

6:00 PM – Meeting Adjourned Mr. Jesse Melgar

Board Chair Jesse Melgar adjourned the meeting at 5:50 PM.

Review Items

- Charitable Giving, Donor Services, and Marketing Team Updates
- Office of Policy and Engagement Report
- Grants and Programs Department Report
- 2025 Community Impact Rapid Response Grantees

  No Action Required | Information Only

Inland Empire Community Foundation
Agency Distributions, Donor Advised Grants, and Scholarships
December 2025 & January 2026
For Approval 3/9/2026

Agency Fund Distributions				
1	1/28/2026	45728	Cove Communities Senior Association dba The Josly	100,000.00
2	12/3/2025	45089	Santa Rosa Plateau Nature Education Foundation	60,000.00
			Total Agency Distributions	**$ 160,000.00**
Donor Advised Grants				
1	12/8/2025	45155	Alliance of Black Women Accountants	10,000.00
2	12/29/2025	45354	Animal Samaritans SPCA	10,000.00
3	12/12/2025	45198	Assistance League of Hemacinto	340.00
4	12/8/2025	45160	Assistance League of Riverside	1,500.00
5	12/29/2025	45356	Bordando Nuestras Raices	11,410.00
6	12/12/2025	45205	California Lions Friends in Sight	400.00
7	12/8/2025	45158	California School for the Deaf - Riverside	1,500.00
8	12/12/2025	45202	Carols Kitchen Inc	300.00
9	1/21/2026	45653	Coachella Valley Rescue Mission	10,000.00
10	12/3/2025	45090	Donors of Color Network, Inc.	5,000.00
11	12/19/2025	45299	Dynamic Catholic	2,000.00
12	12/3/2025	45091	First Tee - Inland Empire	5,000.00
13	12/31/2025	45454	Food Bank of Sweetwater County	60,065.00
14	12/12/2025	45200	Guide Dogs Of The Desert	400.00
15	12/19/2025	45300	LifeSiteNews.Com Inc.	2,000.00
16	12/12/2025	45199	Lions Camp at Teresita Pines	400.00
17	12/2/2025	45095	Loma Linda University Health	10,000.00
18	1/6/2026	45456	Los Angeles Adventist Academy	5,000.00
19	12/8/2025	45161	Mansion Memories	5,000.00
20	12/12/2025	45203	My City Youth Center	400.00
21	1/27/2026	45719	National Multiple Sclerosis Society	10,000.00
22	12/10/2025	45181	Northwest Arkansas Food Bank	750,000.00
23	12/19/2025	45295	Operation Underground Railroad	2,000.00
24	12/1/2025	45094	Palm Springs Public Library Foundation	5,000.00
25	12/19/2025	45301	Remnant Foundation	2,000.00
26	12/8/2025	45159	Riverside Community Health Foundation	1,000.00
27	12/19/2025	45303	Riverside Life Services	2,000.00
28	12/31/2025	45453	Rockwall County Helping Hands “Helping Hands”	150,000.00
29	12/12/2025	45201	Ronald McDonald House Charities of Southern Calif	500.00
30	1/15/2026	45632	Rovers Return Dog Rescue	2,000.00
31	12/12/2025	45204	San Jacinto Lions Club Inc.	500.00
32	1/16/2026	45630	The BairFind Foundation, Inc., dba The Missing Chilc	500.00
33	12/18/2025	45288	The Living Desert	1,860.00
34	12/3/2025	45092	The Youth Hope Foundation	25,000.00
35	12/19/2025	45297	Thomas More Society	1,000.00
36	12/19/2025	45296	Unforgettables Foundation	1,500.00
37	12/1/2025	45093	Unitarian Universalist Church of the Desert	600.00
38	1/1/2026	45455	Unitarian Universalist Church of the Desert	600.00
39	12/29/2025	45353	Variety Boys and Girls Club	10,000.00

Inland Empire Community Foundation
Agency Distributions, Donor Advised Grants, and Scholarships
December 2025 & January 2026
For Approval 3/9/2026

40	12/19/2025	45298	Word Among Us	1,000.00
41	12/19/2025	45302	Wounded Warriors Project	1,000.00
			Total Donor Advised Grants:	**$ 1,108,775.00**
Advised Scholarships				
1	12/2/2025	45056	CSU San Bernardino, Palm Desert Campus	5,000.00
2	12/31/2025	45623	Mt. San Antonio College	1,000.00
3	12/3/2025	45098	Stanford University Financial Aid	4,000.00
4	12/3/2025	45096	UC Regents/U.C.L.A.	4,000.00
			Total Advised Scholarships:	**$ 14,000.00**
Staff Supported Scholarships				
1	12/9/2025	45168	Barstow Community College District	5,000.00
2	12/31/2025	45721	Cal Poly Univ, Pomona	5,000.00
3	12/9/2025	45175	California Baptist University	5,000.00
4	12/31/2025	45458	California State University, Fullerton (Financial Aid)	1,000.00
5	12/4/2025	45122	California State University, Long Beach	2,000.00
6	12/9/2025	45177	California State University, Northridge	1,000.00
7	12/9/2025	45171	Chaffey College Foundation	18,434.00
8	12/31/2025	45718	Crafton Hills College Foundation	5,000.00
9	12/9/2025	45166	Loma Linda University	5,000.00
10	12/31/2025	45622	Mt. San Jacinto College Foundation	9,217.00
11	12/31/2025	45722	Mt. San Jacinto Community College	1,050.00
12	12/31/2025	45654	RCCD Foundation	6,145.00
13	12/31/2025	45685	RCCD Foundation	6,145.00
14	12/31/2025	45689	RCCD Foundation	6,144.00
15	12/17/2025	45254	Riverside Community College District	5,000.00
16	12/18/2025	45290	San Bernardino Valley College Foundation	3,000.00
17	12/31/2025	45618	San Bernardino Valley College Foundation	18,434.00
18	12/18/2025	45289	South Coast College	5,000.00
19	12/3/2025	45097	UC Regents/U.C. Riverside	1,000.00
20	12/9/2025	45162	UC Regents/U.C. Riverside	8,295.00
21	12/15/2025	45221	UC Regents/U.C. Riverside	1,500.00
22	12/31/2025	45457	UC Regents/U.C. Riverside	1,000.00
23	12/4/2025	45123	UC Regents/U.C. San Diego	2,000.00
24	12/31/2025	45584	UEI College - Ontario Campus	1,500.00
25	1/29/2026	45732	University of Alabama	5,000.00
26	12/11/2025	45194	University of Redlands (Financial Aid Office	1,000.00
27	12/31/2025	45692	University of San Diego	5,000.00
			Total Staff Supported Scholarships:	**$ 133,864.00**
			Total Agency Distributions, DAF Grants & Scholarships:	**$ 1,416,639.00**

Inland Empire Community Foundation

Board Approval Request

Inland Empire Black Equity Fund (BEI) and Related Project Funds

Proposed Name Change

In response to the current political climate and opposition to DEI efforts the co-founders of the Black Equity Initiative have rebranded, resulting in a request to change the name of their funds at IECF. The initial Field of Interest Fund and related Project Funds at IECF should be updated to reflect the change.

Items to note:

- The original Inland Empire Black Equity Fund was established in July 2020 as a regional pooled fund to advance racial equity, combat anti-black racism, and to support long-term investments in black-led organizations. Over the five plus years of existence the initiative has raised over $10,000,000.

- New fund name would be: MECCA IE.
  Mobilizing and **E**difying for **C**ollective **C**ommunity **A**dvancement (MECCA)

Request Approved: IECF Executive Committee on _____

Inland Empire Community Foundation

Board Approval Request

Catholic Charities Children's Fund

Proposed Name Change

Catholic Charities San Bernardino & Riverside Counties has requested we change the name of their Catholic Charities Children's Fund to honor one of their donors.

Items to note:

- The Fund was established in April 2017 to support children's programs of Catholic Charities San Bernardino and Riverside Counties
- New fund name would be: Dr. Donald and Carol Averill Children's Fund of Catholic Charities

Request Approved: IECF Board of Directors on _____

From: Jesse Gonzalez
To: Paula Myles
Subject: Renaming the Children"s Fund
Date: Tuesday, February 10, 2026 4:45:42 PM
Attachments: Outlook-1b2yhyrs.png
Outlook-ytkri5mr.png

Good afternoon, Paula,

We would like to request a name change for one of our sub-funds. Please rename the endowment sub-fund currently titled the **Children's Fund** to:

Dr. Donald and Carol Averill Children's Fund of Catholic Charities

Does IECF offer a certificate or other recognition collateral we could provide to memorialize the fund's renaming for our donor?

Please let me know if you have any questions or need anything further from us to process this request.

Regards,
Jesse

Catholic Charities
San Bernardino & Riverside Counties
Jesse Gonzalez, MBA
Chief Operating Officer
1450 North D Street
San Bernardino, CA 92405
Phone: (909) 388-1245
E-mail: jgonzalez@ccsbriv.org
www.ccsbriv.org

Inland Empire Community Foundation
where giving grows

Investment and Financials

Inland Empire Community Foundation
where giving grows

BALANCE SHEET COMPARISON
December 31, 2025
Year-To-Date (YTD)

	December 2025	December 2024	$ CHANGE	% PERCENTAGE
ASSETS				
Cash & Cash Equivalents	47,222,991	51,461,963	**(4,238,972)**	**-8%**
Investments	108,598,287	95,589,487	**13,008,800**	**14%**
Assets Held in Trusts & Insurance	3,366,290	3,379,588	**(13,298)**	**0%**
Receivables	6,373,021	5,337,925	**1,035,097**	**19%**
Fixed & Other Assets including ROU assets	405,629	290,867	**114,762**	**39%**
			-	
TOTAL ASSETS	**$ 165,966,219**	**$ 156,059,830**	**$ 9,906,389**	**6%**
LIABILITIES				
Grants and Other Payables	4,883,083	2,706,406	**2,176,677**	**80%**
Unearned Grant Revenue	-	-	-	
Liabilities to Beneficiaries	756,045	918,234	**(162,189)**	**-18%**
Operating & Finance Lease - ROU Liability	87,379	216,977	**(129,599)**	**-60%**
Line of Credit	4,250,000	1,000,000	**3,250,000**	**325%**
TOTAL LIABILITIES	**9,976,507**	**4,841,617**	**5,134,890**	**106%**
NET ASSETS	**155,989,712**	**151,218,213**	**4,771,499**	**3%**
TOTAL LIABILITIES & NET ASSETS	**$ 165,966,219**	**$ 156,059,830**	**$ 9,906,389**	**6%**

Permanently Restricted*	75,811,834	75,047,902	763,931	**1%**
Temporarily Restricted	80,177,878	76,170,310	4,007,568	**5%**
Unrestricted				
	155,989,712	**151,218,213**	**4,771,499**	**3%**

*Includes quasi-endowed (Board Designated endowments) and Agency Endowment Funds

Inland Empire Community Foundation
where giving grows

INCOME STATEMENT COMPARISON
December 31, 2025
Month-To-Date (MTD)

	December 2025	December 2024	$ CHANGE	% PERCENTAGE
Revenue				
Support (Endowed/Non Endowed)	1,297,060	17,916,899	(16,619,839)	-93%
Grants & Contracts Received	951,390	10,096,177	(9,144,787)	-91%
Investment Income and Market Gain/Loss	920,201	(2,328,066)	3,248,267	-140%
Change in Actuarial Valuation	3,723	(63,066)	66,789	-106%
Other Income	42,572	(79,804)	122,376	-153%
			-	
TOTAL REVENUE & OTHER SUPPORT	$ 3,214,946	$ 25,542,141	$ (22,327,194)	-87%
Expense				
Grants and Scholarships Approved	1,842,494	1,789,731	52,763	3%
Investment Management Fees	4,902	4,122	780	19%
Fund Expense (Non Grant)	4,778	4,187	591	14%
G&A and Program Expense	809,426	973,030	(163,604)	-17%
TOTAL GRANTS & EXPENSE	$ 2,661,600	$ 2,771,071	$ (109,470)	-4%
CHANGE IN NET ASSETS	$ 553,346	$ 22,771,070	$ (22,217,724)	-98%
Intercompany Revenue	841,883	560,510	281,373	50%
Intercompany Expense	(841,883)	(560,510)	(281,373)	50%
Net	-	-	-	

Fixed Assets and Prepaid Expenses Policy

Purpose

To establish capitalization, depreciation, and amortization standards for Fixed Assets and Prepaid Expenses in accordance with U.S. GAAP and sound internal control practices.

1. Fixed Assets

Definition: Tangible assets used in operations with a useful life greater than one year.

Capitalization Threshold:

- Individual items costing **$5,000 or more** with a useful life exceeding one year will be capitalized.
- Amounts below this threshold will be expensed as incurred.

Measurement:
Assets are recorded at cost, including necessary expenditures to place the asset into service. Donated assets are recorded at fair market value at the date of donation.

Depreciation:

- Straight-line method
- Depreciation begins when the asset is placed in service
- Useful lives determined by asset category (generally 3–7 years; leasehold improvements amortized over the lesser of useful life or lease term)

Disposals:
Assets will be removed from the books upon disposal, and any gain or loss will be recognized in the period incurred.

2. Prepaid Expenses

Definition: Payments made in advance for goods or services to be received in future periods.

Recognition:

- Prepaid expenses benefiting future periods and totaling **$10,000 or more** will be recorded as assets.
- Amounts below this threshold may be expensed as incurred unless deemed material.

Amortization:
Prepaid expenses will be amortized on a straight-line basis over the period benefited.

3. Oversight and Internal Controls

- A fixed asset register and prepaid expense schedule will be maintained by the Finance Department.
- Depreciation and amortization will be recorded monthly.
- The policy will be reviewed periodically by management and updated as necessary.

Board Approval:
This policy is effective as of _____ for transactions starting January 1st 2026, and supersedes any prior fixed asset or prepaid expense capitalization policies.

Inland Empire Community Foundation
where giving grows

President & CEO Report

Presentation materials will be provided by the CEO
on March 9, 2026

President's Report – March 9, 2026
Michelle Decker

GENERAL:
The thrust of my work over the last several months has been putting IEGO on track, supporting staff culture and management while we go through transitions plus our staff retreat follow-up, getting the Belonging and Civic Muscle cohort rolling, getting contracts underway for both IEGO and the Vital Conditions Network, and the CIO search.

Staffing/Administration

POSITIONS/CONTRACTS:

- The Chief Impact Officer position received over 60 applications and we have narrowed the pool to five for an initial zoom interview with in person interviews in early April for final candidates. Final interviews will include program staff and board members. We have some very solid candidates and are excited to move forward.
- IECF hired Brian Quach to replace Camille LeMaster in the role of Grants and Scholarships Administrator. This is an important position, especially during scholarship season.
- The External Grants and Contracts position in finance is continuing to seek qualified candidates.
- Torie has ben at IECF for almost two years now. We have agreed that her role can be fulfilled on a contract basis, which gives her more flexibility to pursue other ventures and undertake work abroad. She remains on the California Endowment board of directors which also poses a conflict for IECF accessing funding from TCE, so we think this is a good solution. She will continue to implement the current Gates grant working on ed equity through youth voice and statewide policy.
- IEGO has been supported by Carrie Harmon for several months. However, Carrie has taken a full-time position in Riverside County and is no longer under contract with IECF/IEGO. I'm really pleased that Reg Javier and Nick Schultz are jumping in and taking over operations, strategy, and resource development for us, working closely with IECF to wrap up the CA Jobs First work and oversee team activities and day to day decision making. I realize it's all a lot to keep up with, but they will take some of the pressure off of Khyati and myself.
- Staff held a retreat in February, facilitated by John Kobara. It helped staff connect to each other, mitigating some of the effects of a virtual and hybrid office. It is a cost we need to bear every 12 months to unearth issues, questions, and deepen connections. A workplan has been created, including discussing outsourcing HR with a firm, reorganizing staff meetings, and revisiting our hybrid work policy to maximize time together as staff. John reinforced that this journey is what you make it. IECF is a good place to work, solutions are in your hands, and give grace to others (one never knows what people are experiencing). Basic messages every office needs.
- We are hosting the Groundwater Training with the Racial Equity Institute on April 1 and 2. If any board member would like to attend, you are officially invited. The training is less about us as individuals and more a powerful explanation for the historic and current role of racism in US policy making and life.

IMPACT INVESTING: The first round of loans has been approved by the loan committee! Very excited for this to keep moving forward. The next round will be in May, open for one month. Nonprofit Finance Fund has been a great partner,

and the loan committee is finding its footing. The interest was high for both jurisdictions, and potential to deploy these funds fully over the next two/three rounds is high. Thank you, Khyati for the extensive work on this!

VITAL CONDITIONS IECF UPDATE & ALIGNMENT

The VC framework helps us collaborate more effectively across the region. The following are descriptions of programmatic efforts, aligned funds, and potential activities bubbling up around Vital Conditions discussions that IECF is part of or leading.

Out of all the seven VCs, I am sharing new information on the following:

BELONGING and CIVIC MUSCLE

1. Final decision on The Belonging and Civic Muscle cohort rolled out in February. Please see Celia's report for the final list. This group will convene over nine months to deepen their understanding of and strategies for belonging. Note – this is the first of its kind in the country! The IE leads once more!
2. The IE is experiencing as many ICE raids as LA, but few people realize this. We also have a major detention and ICE processing center in Adelanto. Graciela, Jesse and I attended the United We Stand conference in LA, hosted by the CA Community Foundation, on this issue. CCF developed a communications campaign called Am I Next – www.aminextla.org – which we want to discuss at the Board meeting.
3. I've been talking with Raul Macias from Haas, Jr. about a fund for the IE that would work with voter registrars to invest with voter education dollars; Haas would match. Grants would be distributed to nonprofits for voter engagement through a trusted messenger model, like Census. We met with San Bernardino County and have an upcoming meeting with Riverside County.

MEANINGFUL WORK and WEALTH

1. We await state decision about the Regional Innovation grants. These grants extend new funding for the activation plans developed through the Catalyst/CA Jobs First process. The grants submitted include partners for clean tech and cybersecurity, including the City of Riverside, UCR, SBCCD, and others.
2. WRCOG and their IREN program – Inland Regional Energy Network – approached IEGO for a multi-year investment to support clean tech in the region. This would support the activation plan on clean tech.
3. We are moving ahead with a contract to Karen Serrano to implement a community ownership learning and landscaping effort for the IE, with Irvine funds.

LIFELONG LEARNING

1. After several submissions, the Gates Foundation and I agreed to not proceed with managing their pathways work. Hopefully this will go to GIA (Growing Inland Achievement). This was an incredibly frustrating process and yet the net loss for us is about $50,000/year divided between some staff/contract funding and a bit of overhead (3 years). Not critical money for our operations. They wanted IECF's convening power, but in the end it would have required us to manage a detailed body of education work that is not a good use of our time and talent. we have left things on good footing and remain a grantee on the North American policy side. Sometimes it pays to say no.

HUMANE HOUSING

1. We will be co-hosting a faith-based housing tour with the Inland SoCal Housing Collective scheduled for April 17. Please consider joining! This will include state partners. Faith lands are an increasingly important opportunity for affordable housing, enabled by state legislation (SB4). The IE has some great examples we are excited to show off.

2. The decision by Riverside City Council to not advance a 114 until transitional and supportive housing project on University Avenue is having ripple effects with the state and across the region. It has also animated nonprofits serving our most vulnerable people to continue to pressure this council to reconsider the project and to get behind new efforts to build units that, according to the state, the City has failed to do (in the lowest economic segment of RHNA – regional housing needs allocation – numbers, produced by the state and distributed/monitored by Southern CA Association of Governments).

BASIC NEEDS FOR HEALTH and SAFETY

1. We managed to convene 15 partners with Open AI on the issue of using AI to improve the social safety net using. It was a rich conversation and showed the many breaks in the existing system, especially between public services. I also met with the head of Global Marketing for Open AI. There will be hundreds of millions of dollars, if not billions, required to be distributed to communities through their nonprofit governance structure. Positioning the IE to access those funds and get what we need makes sense.
2. You will see in Graciela's report about our February Leg Roundtable on the effects of HR 1. We will be carrying data and stories to the Hill for Foundations on the Hill in March, the philanthropy fly-in.

THRIVING NATURAL WORLD

1. IECF hosted the first gathering of Regional Forest and Fire grantees and partners to form a new advisory body for the IE. Well done event with good facilitation and plans for next steps.
2. Our connections to tribes around wildfire and land management continue to expand through our partnership with the Native American Land Trust and our team.

Meetings/Out and About

- Dinner with Chancellor Hu – thank you, Elizabeth, for making it happen, and Lou for joining the meet and greet.
- Philanthropy and Equity Roundtable in San Francisco – great discussion over two days about meeting the current moment and a 20 year vision for what philanthropy should achieve to make life better for Californians.
- United We Stand: 2026 Immigration and Democracy Summit, LA
- CA Journalism Summit with Paulette, Brie, Zerenity, Charee, Laurie, Nef, Jesse
- K-16 Collaborative lunch to discuss future funding needs
- Sky Allen on civic engagement in the IE & Sky Allen and Sherheryar Kaoosji on the Movement Innovation Center
- Gathering with CBOs serving immigrants, arts, LGBTQ+ with Sen. Padilla's state director.
- IE Funders' Alliance monthly meeting on their new strategic roadmap
    - IEFA Strategic Road Map 2-12-26.pdf - Google Drive
- Wildfire Solutions Coalition meeting with Mayor Villaraigosa
- IEEP State of the Region
- Chet Hewitt, Sierra Health Foundation on post-Vienna learning and potential CA housing community of practice
- Blended Impact dinner – an economic development group led by Stacy Cumberbatch
- SoCal Grantmakers – attended first board meeting
- GIA Board meeting – reminder I am board treasurer
- The Chase Awards at Scott Discount/Morgan Stanley's tables

Inland Empire Community Foundation
where giving grows

Committee Reports & Discussion

Board Member Onboarding
Orientation Agenda

Date: April 00, 2026 **| Time:** 10:00 AM – 2:00 PM
Location: 3700 Sixth Street, S. 200 Riverside, CA 92501

Welcome & Opening Remarks | 10 AM – 10:15 AM

- Purpose of Today's Orientation
- Overview of Agenda

Board Member and Leadership Introductions | 10:15 AM – 10:30 AM

- New Board Member Introductions
- IECF Leadership Introductions
    - How leadership supports the Board of Directors

IECF in Practice |10:30 AM – 11:30 AM

Part I: How IECF Works

- How decisions are made
- Strategic Framework

Part II: IECF Today and What's Ahead

- 85th Anniversary
- Vital Conditions Network

Break

Part III: Board Portal Overview and Navigation

- Overview of the Board Portal and how it's organized
- Expectations for ongoing use and engagement

DRAFT

Board Roles and Responsibilities | 11:30 AM – 12:00 PM

- Expectations for Engagement and Participation
- Committee Overviews
    - Brief Remarks from Committee Chairs or Staff Liaisons
    - Invitation for Board Members to Explore Committee Participation

Lunch | 12 PM – 1:00 PM

Board Buddy Program | 1 PM – 1:15 PM

- Overview of the Program
- Board Buddy Assignments and Contact Info

Open Discussion | 1:15 PM – 1:45 PM

Closure | 1:45 PM – 2:00 PM

DRAFT

Inland Empire Community Foundation
where giving grows

Review Items

Staffing/Administration

In 2026, the Charitable Giving and Marketing Team is building on the strong momentum of our ten signature funds, including the Inland Empire Community Foundation's Asian American, Native Hawaiian, and Pacific Islander (AANHPI) Fund and the newly launched "Out in the IE" LGBTQ+ Fund. Together, these funds reflect IECF's continued commitment to advancing equity, belonging, and opportunity across the Inland Empire.

Over the past year, we deepened our impact and policy leadership through signature convenings and strategic communications, while sharpening our focus on compelling storytelling, donor engagement, and community-centered messaging. In 2026, that focus expands through a coordinated 85th Anniversary campaign designed to amplify IECF's mission, elevate community voice, and inspire transformational philanthropy. Our work continues to center on strengthening strategic relationship management that supports IECF's primary organizational goals and aligns with our department's key objectives.

The Charitable Giving and Marketing Committee continues to refine its long-term strategy—moving from an over-reliance on fundraising events and short-term contributions toward securing transformational gifts, expanding endowment growth, and increasing testamentary commitments. This evolution is reinforced by sustained investments from Here for Good Today, which ensure a strong team and infrastructure dedicated to advancing the Inland Empire's vital conditions so that everyone in our community can thrive, without exception.

IECF Celebrating 85 Years of Impact – Here for Good: 1941–2026

IECF's 85th Anniversary is designed to serve as a powerful platform for marketing, engagement, and philanthropy: honoring our legacy while boldly advancing our future vision. The anniversary campaign will:

- Position the 85th as a catalyst for engagement and giving
    - Elevate visibility, deepen community connections, and inspire new and increased philanthropic investment.
- Reinforce IECF's distinctive value propositions:
    - Building a Culture of Philanthropy: advancing sustainable giving through legacy gifts and endowments.
    - Innovative Community Leadership: driving long-term solutions through the Here for Good Fund.
    - Rapid Response Grantmaking: demonstrating the power of Community Impact Funds to address urgent and emerging community needs.
- Leverage an Anchor Opportunity
    - Identify and announce a major matching funder/s at the September anniversary event, creating urgency and momentum for new gifts and multi-year commitments.
    - Increase public understanding of the value of a strong community foundation.
    - Highlight IECF's role as a trusted, permanent, and impact-driven philanthropic partner serving the Inland Empire.
- Strengthen donor loyalty and attract new partners
    - Inspire current and prospective donors, fundholders, and community partners to invest in IECF's next chapter; building on 85 years of leadership and positioning the foundation for lasting impact in the decades ahead.

Through this milestone year, the Charitable Giving and Marketing Team will align storytelling, campaign strategy, donor cultivation, and anniversary activations to ensure that IECF's 85th year is not only a celebration of our history but a launchpad for transformational growth and community impact.

2026 Charitable Giving, Donor Services and Marketing Objectives

1. Build and execute an IECF 85th Anniversary campaign in 2026 to serve as a launchpad for IECF's next 10-year strategic plan.
2. Implement a centralized relationship management approach utilizing C Suite to identify, cultivate, steward and solicit donors and prospects with a focus on endowed funds (long-term strategy) with all donors and fund holders
3. Build relationships with professional advisors to create pipeline for referrals
4. Raise visibility and awareness of IECF throughout the region and support communications team for newsletters, reports, and other materials
5. Strengthen recognition/benefits/service for donors, Brouse Society and professional advisors.

Charitable Giving and Marketing Committee MEMO – January 6

MEMORANDUM

To: CG/M Committee
From: Brie Griset Smith, CSPG
Date: 1/6/2026
Re: Anniversary Conversations & Board Support Tools — Timeline and Strategic Approach

Purpose

This memo outlines a proposed timeline and strategic framework for leveraging IECF's Anniversary as a marketing, engagement, and fundraising platform, with a focus on equipping Board members to actively support outreach and donor engagement.

Strategic Objectives

The 85th Anniversary is designed to:

1. Position as a platform for marketing, engagement, and philanthropy.
2. Reinforce IECF's distinctive value propositions:
    - Building a Culture of Philanthropy — advancing sustainable giving through legacy gifts and endowments.
    - Innovative Community Leadership — driving solutions through the Here for Good Fund.
    - Rapid Response Grantmaking — demonstrating the power of Community Impact Funds to address urgent community needs.
3. Leverage an Anchor Opportunity by identifying and announcing a major matching funder at the event in Sept.
4. Increase public understanding of the value of a strong community foundation—trust, permanence, and impact.
5. Strengthen donor loyalty and attract new partners inspired by IECF's legacy and future vision.

Proposed Timeline & Key Activities

Phase 1: Strategy & Planning

(9–12 months prior to Anniversary)

- ✓ Committee & Board confirmed use of the Anniversary as a marketing and engagement platform.
- ✓ Established shared goals and success metrics (awareness, engagement, fundraising).
- ✓ Drafted core messages aligned with IECF's value propositions (above).
- ✓ Begun identification and cultivation of a potential matching funder.

Phase 2: Board Leadership & Support Tools

(6–9 months prior to Anniversary) - NOW

- Confirm 100% Board participation in Anniversary outreach *(Confirmed $25,000 Give or Get in 2026)*
- Set expectations for Board leadership through:
    - Personal giving
    - Ambassador-level donor engagement
- Develop and distribute a Board Outreach Toolkit, including:
    - Email/letter templates
    - Talking points, data points, and impact stories
    - Sample scripts for calls, meetings, and small group conversations
- Each Board Member identifies 10 donor or professional advisor contacts for Anniversary outreach.
    - Donor Atlas is a new tool!

Phase 3: Storytelling & Public Campaign

(4–6 months prior to Anniversary)

- Launch a storytelling and legacy campaign highlighting:
    - Points of pride from IECF's history
    - Milestone grants
    - Leadership moments and personal stories
- Deploy campaign assets through:
    - Digital storytelling and social media
    - Short video features and interviews
    - Event displays, banners, printed materials, and website content
- Advance messaging focused on trust, permanence, and community impact.

Phase 4: Board-Led Engagement & Event Build-Up

(2–4 months prior to Anniversary)

- Board Members actively engage donors and partners using provided tools.
- Conduct personal outreach, invitations, and small group conversations.
- Finalize and prepare announcement of the matching fund opportunity.
- Align marketing and engagement efforts with the upcoming Anniversary Event.

Phase 5: Anniversary Event – September TBD

- Celebrate IECF's legacy and leadership.
- Announce the matching funder and call to action.
- Demonstrate IECF's impact through culture of philanthropy, innovation, and rapid response.
- Ensure visible Board leadership and donor engagement during the event.

Phase 6: Post-Event Momentum & 2026 Year-End Giving

- Implement post-event stewardship and follow-up.
- Share outcomes, impact highlights, and early results.
- In Q4 of 2026, Board Members finish the year with:

  - 100% give/get giving goals accomplished
  - Strong introductions to new donors and partners created
- Collective goal: Raise $25,000 at least per member in 2026 as a continuation of Anniversary momentum.

Committee Discussion & Next Steps

The Committee is asked to:

- Review and affirm the proposed timeline and approach.
- Provide guidance on Board engagement expectations.
- Identify next steps for matching funder cultivation and toolkit use within own personal networks.
- Be willing and ready to share why you are "Here for Good" with IECF!

Next Meeting Date: March 4; 2026

Time: 3:00–4:00 PM

Signature Funds

AANHPI (Asian American, Native Hawaiian and Pacific Islanders) Fund:

1. Building upon the success of last year, Ben is working with the committee to schedule strategic planning for the Fund, focusing on governance structure, fundraising strategy, marketing partnerships, and timeline development.
2. 2026 fundraising and impact goals being determined.

Black Equity – Inland Empire Fund (Now: M.E.C.C.A. IE):

1. To strengthen Black-led organizations and foster positive change across the region, Black Perspectives IE, a weekly segment on KVCR Public Media will continue.
2. In recognition of Black History Month, Mapping Black California has released a comprehensive update to the "M.E.C.C.A. IE Fund Report (formerly the BEI Data Report)," originally commissioned in 2023 by M.E.C.C.A. IE Fund at the Inland Empire Community Foundation. Two years later, the report highlights the Inland Empire's status as a region experiencing strong economic and public infrastructure development in the face of cooling statewide migration and rising living costs. Funding for the M.E.C.C.A. IE Fund Report was made possible through generous support from Edison International.

Build Coachella Valley Fund (BCVF):

- The Build Coachella Valley Fund (BCVF) committee met in January and February to advance communications, fundraising strategy, and near-term grantmaking. The group agreed to develop a short donor-facing video, issue a small round of mini-grants to demonstrate impact, and begin planning for a November cultivation event. The committee also confirmed a regular monthly meeting schedule moving forward.
- This year, BCVF plans to identify the most innovative educational programs and initiatives for underserved communities and at-risk youth in the valley that ignite a love of learning and encourage critical thinking skills.

CIELO Fund:

- CIELO Fund grant partners being determined now!
- Next CIELO Event already scheduled for the RCOE Conference Center – Riverside on 10/3; 11am-2pm!
  - Mark your calendars!
- Will be working with Jesse and the committee in the Spring to strategically plan for the Fund, focusing on fundraising strategy, marketing partnerships, and timeline development.

Charitable Giving, Donor Services & Marketing Team Update
2/23/2025

Fund for a Creative IE (Renamed from Arts for the IE):

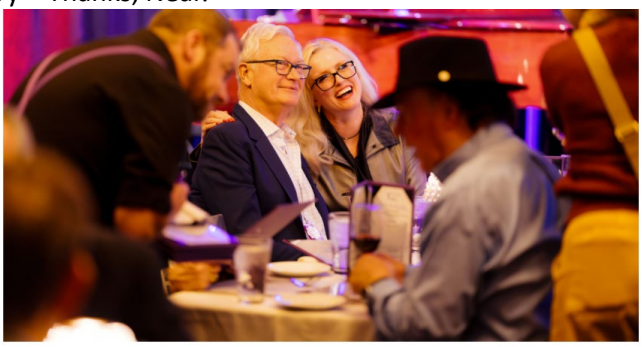
- 2026 Fundraising and impact goals being determined.

Journalism and Innovation Hub + Fund (JIHF):

- California Journalism Philanthropy Summit held on January 23, 2026. The conversations, connections, and shared commitment throughout the day underscored how vital this moment is for local journalism and how much is possible when philanthropy, journalists, and institutions come together with intention.
- Major donors being engaged to support work.
- $10M planned gift promised, with $2.5M for JIF Endowment in pipeline!

Here for Good Fund:

- Held IECF "Investments and Donor Learning Session" in February – Thanks, Neal!
- Policy and Philanthropy Summit to be held – August 5 &
- Here are the 2026 sponsorship details.
- 2nd Annual IECF Professional Advisors Cocktail and Dinner
    - *If you're working with a financial or estate planning professional, we can collaborate with them to align your charitable goals with your broader wealth planning. For advisors, we serve as a trusted local partner with flexible fund options, plenty of resources, and steady back office support. (We also love to celebrate that partnership, as we did recently at the Purple Room!)*



Building the Future Together: A Celebration of Our Professional Advisors

- Brie Griset Smith, CSPG named as Board Chair of the Inland Empire Estate Seminar.
- Planning to celebrate IECF staff and board teamwork at Sergio and Christy Bohon's home – Spring 2026!
- Getting ready to launch the 85th Anniversary with donor event in September 2026.

Out in the IE – LGBTQ+ Fund:

- Thrilled to have the following Committee Members including: Scott Discount, Jesse Melgar, Gabriel Maldonado, Angel Rodriguez, Ariel Savage!
- The committee continued strategic planning for the launch of the Out in the IE LGBTQ+ Fund, focusing on governance structure, fundraising strategy, marketing partnerships, and timeline development. Guidance from Inland Empire Community Foundation leadership helped clarify the grantmaking rubric and a phased timeline toward a 2027 grant cycle.
- Members emphasized the importance of early donor cultivation, community-centered fundraising events, and partnerships with regional organizations including the Civil Rights Institute of Southern California and the Williams Institute.
- The group also discussed summit logistics, marketing collaborations, and leadership roles, concluding with agreement to reconvene in one month to continue momentum.
- With the board's leadership, we have started a constellation of sub Signature Funds to support general grant making, scholarships as well as two endowed funds to sustain these purposes.
- Will announce the fund at the upcoming Palm Springs Philanthropic Summit on March 18!

Women's Giving Fund (WGF):

- Our Women's Giving Fund Spring Fling Event is coming to Coachella Valley on March 22, 2026. RSVP today!
- We have several sponsorship levels available for your consideration
- HERE, as well as welcome any gift donation amount you wish to contribute HERE.
- WGF selecting Women of Achievement Awards and Grantees!

FRieNDS OF VETERANS Fund:

- Building upon the success of last year, working to create 2026 fundraising and impact goals.

Marketing and Communications Updates

Marketing Updates:

- **Women's Giving Fund Spring Fling – Desert Edition**
  - Kicked off promotional campaign (online/digital) announcing the Spring Fling coming to the Coachella Valley
  - Engaging geo-targeted current/prospective donors with WGF content and event programming
  - To film 3 grantee videos that will be shown at Spring Fling on Mar 22
  - Coordinating pre-event and post publicity opportunities for grantee winners and Women of Achievement honorees

- **Board Training Videos:** A refreshed set of videos will be uploaded on the Board portal to support the onboarding process of new IECF board members and staff.

- **85th Anniversary Campaign:** Preparing for implementation of our marketing activities that share IECF's unique story, highlight our value as the region's oldest and largest community foundation and launch for our 10-year strategic plan. Currently reviewing potential anniversary logos.

- **IECF Ambassador Toolkit:** As we celebrate our 85th Anniversary, this kit will help board members share information about IECF in the community and talk about what we do. This is currently in development and will be shared when finalized.

Media Partnerships

- **IE Latino Voices**
  - Along with the usual 5-minute in-studio interviews with nonprofits, the show is expanding to include **IE Latino Voices on the Road**. KVCR reporters will meet community members where they are, creating short, powerful segments optimized for Instagram, Facebook, TikTok, and YouTube to reach and engage Latino communities and beyond.

Communications Updates:

- **Press Releases** include: (January - February 2026)
  - IECF Welcomes Four New Board Members & Announces New Committee Chair (Jan 22, 2026)
  - Updated M.E.C.C.A. IE Fund Report Highlights Growth & Persistent Gaps in the IE (Feb. 26, 2026)

Media Relations:

- Between Sept-Oct, the Total Potential News Reach is **68 million!** *(estimates potential viewership of IECF news based on # of monthly unique visitors to the source)*
    - See Earned Media Measurement Report & Media Clips (Nov-Dec 2025)

Social Media:

See analytics report. Highlights Include:

- Instagram is our top-performing platform, bringing in 56% of our overall post impressions at almost 50,000 impressions and 4.8k followers.
- The top-performing LinkedIn post lately is the 2026 Board Announcements, with 135 reactions (Our audience wants to know more about our board!).
- Post shares are up by 156%, totaling 560 shares between Jan and Feb.

IECF Sponsorships & Speaking Opportunities (upcoming)

- Riverside Art Museum Top Dog Honorees (Mar 11) – IECF staff to attend
- Riverside Arts Council Mayor's Ball for the Arts (Mar 21)

Office of Policy & Engagement Activities

Latino Leadership Roundtable with Team U. S Senator Alex Padilla

At the invitation of IECF Board Chair Jesse Melgar, IECF convened a roundtable with Team Padilla on February 9, 2026, during the State Director's visit to the Inland Empire. Jesse's relationship and direct coordination with the Senator's office made the convening possible and reflects the strategic role Board leadership plays in advancing IECF's policy engagement.

When Board leadership activates relationships in alignment with IECF's regional priorities, the foundation is able to convene federal partners in a structured, high-standard setting that elevates Inland Empire voices. Thank you, Jesse!

The roundtable focused on Latino leadership and the real-time impacts of federal policy shifts on service delivery across the region.

Participants included IECF Board leadership and CIELO Fund partners alongside the following Latino-led and Latino-serving organizations:

- Arts Council of San Bernardino County
- Centro Del Inmigrante
- El Sol Neighborhood Educational Center
- Garcia Center for the Arts
- Huerta Del Valle
- IE United
- Inland Coalition for Immigrant Justice
- Inland Empire Community Collaborative
- Inland Empire Prism Collective
- Inland Empire Immigrant Youth Collective
- Inland Empire Labor Institute
- TODEC Legal Center
- TruEvolution

The convening was structured as a facilitated listening session grounded in lived experience. Discussion centered on how H.R. 1 and immigration enforcement visibility are affecting healthcare access, enrollment stability, workforce participation, food security, and nonprofit operational capacity.

Across sectors, organizations reported:

- Missed health and behavioral health appointments
- Declines in enrollment and re-enrollment participation
- Increased mental health strain among families and staff
- Capacity shifting from long-term programming to crisis response
- Rising administrative burden amid funding instability

A consistent theme emerged: instability is eroding trust, and trust remains foundational to service utilization and community stability.

IECF convened this dialogue to listen, synthesize cross-sector patterns, and ensure Inland Empire realities inform federal understanding. The roundtable reflects IECF's strengthened capacity to engage federal partners responsibly while centering place-based leadership.

Inland Empire Legislators' Roundtable

Launched in April 2025 with more than 20 district representatives, the Inland Empire Legislators' Roundtable continues to strengthen IECF's relationships with the 30 state and federal District Directors serving the region. This quarterly, bipartisan convening builds on the success of IECF's annual Policy & Philanthropy Summit and serves as a consistent forum for strategic communication, regional alignment, and relationship-building between philanthropy and government.

The roundtable remains IECF's primary policy interface with district offices, reinforcing the foundation's role as a credible, nonpartisan convener and regional partner. Each session is intentionally aligned with state and federal priorities impacting the Inland Empire, including health, housing, workforce development, economic mobility, and long-term regional competitiveness.

In February 2026, IECF hosted the first roundtable of the year at its Riverside offices, focused on the State of Health in the Inland Empire.

February Roundtable

The February Roundtable convened district representatives for a focused briefing on regional health conditions and system pressures impacting Inland Empire communities. IECF partnered with HC2 Strategies to provide real-time, data-driven analysis of healthcare access, coverage trends, provider capacity, and emerging regional risks.

Participation and Engagement

Sixteen representatives from state and federal district offices participated in the February Roundtable. This level of attendance reinforces sustained engagement and signals that district leadership views the roundtable as a valuable, strategic space for coordination.

Discussion reflected shared concerns around provider shortages, hospital and safety-net system capacity, behavioral health access, and the fiscal pressures facing regions with high concentrations of publicly insured residents.

Engagement continues to deepen. District directors are not simply attending; they are contributing, comparing notes across offices, and seeking alignment. The roundtable model is working. IECF is increasingly recognized as a trusted regional convener and a credible bridge between data, philanthropy, and legislative leadership.

Program Highlights

- **State of Health Briefing:** Kate Volti of HC2 Strategies presented current data on the State of Health in the Inland Empire. The discussion focused on regional coverage trends, provider workforce shortages, hospital and safety-net capacity, and how the Inland Empire compares to state and national benchmarks. The data provided a clear snapshot of where the region stands and areas requiring continued attention.
- **Federal Policy Considerations:** District representatives discussed potential implications of HR1 and other federal proposals that could affect healthcare access and funding streams. The conversation centered on understanding possible regional impacts and ensuring offices are prepared to respond as federal negotiations evolve.

- **Open Discussion**: The roundtable provided space for district offices to compare information and identify shared themes. This exchange continues to reduce siloed approaches and strengthens regional alignment in responding to emerging policy developments.
    - **Constituent Feedback Trends:** Representatives shared that feedback from constituents reflects broader uncertainty rather than issue-specific. The theme across offices was general concern about stability and access, particularly related to healthcare and public benefits.

Office Attendance

Governor's Office
External Affairs

U. S Senate
Senator Adam Schiff

U.S. House of Representatives
Rep. Raul Ruiz (CA-25)
Rep. Pete Aguilar (CA -33)
Rep. Mark Takano (CA-39)

California State Senate
Sen. Steve Padilla (SD-18)
Sen. Suzette Martinez Valladares (SD23)
Sen. Eloise Gomez Reyes (SD-29)
Sen. Sabrina Cervantes (SD-31)

California State Assembly
Asm. John Harabedian (AD-41)
Asm. James Ramos (AD-45
Asm. Greg Wallis (AD-47)
Asm. Robert Garcia (AD-50)
Asm. Michelle Rodriguez (AD-53)
Asm. Leticia Castillo (AD-58)
Asm. Corey Jackson (AD-60)

2026 IE Legislators' Roundtable:

The 2026 Inland Empire Legislators' Roundtables are scheduled for

- May 20th
- August 5th
- November 12th

Each convening will focus on IECF's policy priorities and continue advancing coordinated engagement with state and federal district offices across the region.

IE Legislators' Roundtable Follow-Up: Faith Based Housing Tour

As a direct follow-up to the December Inland Empire Legislators' Roundtable, IECF is partnering with the Inland SoCal Housing Collective to convene a regional Faith-Based Housing Tour on April 17, 2026.

All Inland Empire legislative district offices will be invited. Invitations have also been extended to Tomiquia Moss, Secretary of the California Health & Human Services Agency, and Sasha Kergan, Deputy Secretary, to provide state perspective on SB 4 implementation and faith-owned land as a housing solution.

The tour advances the SB 4 conversation introduced at the December Roundtable by grounding policy discussion in active, site-based examples. Participants will visit:

- Water of Life Community Church's CityLink campus (Fontana), a church-funded model integrating transitional and permanent supportive housing with on-site services.
- Vista de La Sierra, an 80-unit affordable housing development on faith-owned land with 39 permanent supportive housing units and integrated services.
- Crest Cottages, a transitional housing community for foster youth and families opening Summer 2026.

The convening concludes with a moderated state-regional dialogue connecting site lessons to California's broader housing and homelessness strategies. This follow-up deepens district office engagement, reinforces IECF's leadership within the region's housing ecosystem, and advances the Humane Housing Vital Condition by positioning faith-based land as a scalable implementation strategy.

Foundations on the Hill – Washington, D.C. Engagement

IECF is leading the California Delegation at Foundations on the Hill (FOTH), March 16–19, 2026, in partnership with The California Wellness Foundation and the Conrad N. Hilton Foundation.

This leadership role reflects IECF's growing presence within statewide philanthropy and ensures Riverside and San Bernardino Counties are represented in federal advocacy.

Convening Structure

The multi-day engagement includes:

- Pre-conference workshops and sector alignment sessions
- National plenaries and federal policy briefings
- California delegation strategy sessions
- A Capitol Hill California Delegation Breakfast convening in partnership with California Wellness Foundation and the Conrad N. Hilton Foundation.
- Joint caucus and congressional committee advocacy meetings
- Individual meetings with Inland Empire members of Congress

This structure enables alignment across national philanthropic leaders while advancing region-specific federal engagement priorities.

IECF has confirmed meetings with:

House Representatives:

- Representative Jay Obernolte
- Representative Raul Ruiz
- Representative Judy Chu
- Representative Pete Aguilar
- Representative Norma Torres
- Representative Mark Takano
- Representative Young Kim
- Representative Ken Calvert
- Representative Darrell Issa

Organizations:

- Urban Institute
- America Achieves

Joint Advocacy Meetings with The California delegation:

- Team U.S Senator Adam Schiff
- Team U.S Senator Alex Padilla

California Organizations Represented

The California Delegation includes:

- Inland Empire Community Foundation
- Conrad N. Hilton Foundation
- The California Wellness Foundation
- William & Flora Hewlett Foundations
- Hispanics in Philanthropy
- Grantmakers Concerned with Immigrants & Refugees
- Catalyst of San Diego & Imperial Counties
- Philanthropy California

This leadership reflects years of relationship-building and the evolution of IECF's policy and advocacy strategy. Over the past two years, the foundation has strengthened bipartisan engagement, deepened alignment with statewide philanthropic partners, and consistently demonstrated value as a trusted, data-informed resource to district offices and federal partners alike.

Leading the California Delegation signals that IECF's model of nonpartisan, regional advocacy is recognized at a national standard. Through disciplined coordination and a deliberate commitment to aligning philanthropy and public policy, IECF has positioned the Inland Empire within the federal conversations shaping charitable policy, nonprofit stability, housing, health, workforce pathways, and climate resilience.

IECF's Policy & Philanthropy Summit, August 5-6, 2026

2026 Policy & Philanthropy Summit Planning

We have begun planning for the 2026 Policy & Philanthropy Summit and are intentionally restructuring the format to deepen impact and strengthen regional positioning.

The Summit will transition to a one-day convening, preceded by a "Day 0" regional immersion experience. Day 0 will feature curated tours across Riverside and San Bernardino Counties, bringing funders, partners, and policymakers into the region to see firsthand the leadership, collaboration, and priorities shaping our work. The goal is to ground the Summit in lived context and demonstrate that the Inland Empire is organized and ready for investment.

As we shape the program, we are considering two framing approaches: organizing the Summit explicitly around the Vital Conditions framework as a coalition model, or structuring the content around the most urgent issues keeping regional leaders up at night. We are assessing which approach will best drive clarity, engagement, and forward momentum.
We have secured our keynote speaker and look forward to announcing soon. We welcome Board engagement as we refine the overall framing, tour strategy, and program design for this next phase of the Summit.

INLAND EMPIRE COMMUNITY FOUNDATION

Programs & Community Impact Report

March 9, 2026 Board Meeting

I. Inland Empire Vital Conditions Network (IEVCN) Belonging & Civic Muscle (BCM) Cohort

The Inland Empire Vital Conditions Network (IEVCN) is a voluntary and free *network-of-networks* striving to reimagine our collective actions to advance equitable well-being for all who call the Inland Empire home. The inaugural **Inland Empire Belonging & Civic Muscle (BCM) Cohort**, a grant opportunity generously supported by the Wingate Foundation, closed January 12. Thirty applications were reviewed and 15 teams were selected. See attached. The Teams will now embark on a learning journey— orientation, 4 labs, capstone.

II. CIELO Grant Opportunity

Cultivating Inland Empire Latino Opportunity (CIELO) Fund at IECF grant opportunity closed Feb. 16. Forty three applications are being reviewed by the CIELO Leadership Committee. Decisions are expected to be released by end of March.

III. Regional Forest & Fire Capacity Building Program

The IECF RFFC Program is making significant progress by formalizing its alliance with the Inland Empire Fire Safe Alliance to strengthen community wildfire resiliency in Riverside County and launching the CAL FIRE Block Grant Pilot Project and initiating the Point of Rocks Fuel Reduction Project in Pine Cove to enhance a critical shaded fuel break. The Subgrantee Capacity Building Program as nonprofit partners advanced their wildfire preparedness initiatives; and completing final updates to the 2026 Regional Priority Plan, which now features new public-facing sections on wildfire ordinances, community engagement, and Tribal relations to better support residents across the Inland Empire. Two capacity building proposals on engaging the Cahuilla, Santa Rosa and Ramona tribes are currently under review.

IV. Educational Equity

The Education Equity program continues to advance vital work at the intersection of data, storytelling, and community voice. A centerpiece of this phase has been the intentional filming of parents and students who navigate the daily realities of schools plagued by a shortage of qualified teachers, communities whose lived testimonies represent a form of knowing that quantitative data alone cannot capture. Those closest to the wound hold the deepest wisdom, so these filmed narratives are not supplementary to the data; they *are* the data; rich, embodied, and irreplaceable. The absence of parent and student voices from dominant educational datasets is not an oversight but a structural silencing, and this work moves deliberately against that erasure by centering the people most impacted as co-authors of the story being told.

A meaningful milestone has been reached with the completion of revisions for the Gates Pathways Grant. Looking ahead, the momentum continues to build as preparations are

underway to attend the Accelerate Ed conference in Columbus (Torie and Michelle), a gathering that offers both an opportunity to connect with aligned thinkers and to bring the urgent, human-centered insights of this work into broader national conversations about educational equity and systemic transformation.

V. Youth Grantmakers

The Youth Grantmakers cohort 2025-2026 started October 11th . There are participants representing Riverside, San Bernardino and Coachella Valley area. They participated in their first Community Service activity where they partnered with GHC Hope and toys were collected for foster youth in Indio for Christmas The YG Grant Opportunity opened February 23rd and closes April 30th . Funding focus areas are: Mental Health, Academic Stress, Financial Education, Youth Community, Minority Support (LGBTQ and Immigration), and Using AI as a tool and not a replacement for doing the work. The grant opportunity will fund programs in Riverside, San Bernardino and Coachella Valley.

VI. **Western Riverside Council of Governments-Inland Regional Energy Network (WRCOG-IREN)**

IECF was awarded $1.14 Million by WRCOG for implementing the IREN Equitable Building Decarbonization (EBD) Direct Install Program Marketing, Education, and Outreach Services to identified census tracts in the areas of Indio, Moreno Valley, Riverside High Grove, Hesperia, San Bernardino, Apple Valley/Victorville. The amount may be increased to $1.3 million, pending approval by the WRCOG and CEC in the next month. This is a regranting opportunity for nonprofits to develop a community-based outreach and engagement plan that leverages existing relationships within the communities served. Customized outreach strategies for each community and property type are tailored based on the unique characteristics and needs of the populations and select the best retrofits and installs that fit the participants needs. The maximum award is $95,000 for each of the 12 potential nonprofits.

VII. IECF Disaster Preparedness Project

The project is moving along, finalizing the detailed, standardized, and formatted version of all IECF departments' Continuity of Operations Plans (COP). This includes restructuring, adding backup information, filling gaps, and consolidating content into a cohesive document. West Coast Consulting is drafting the Emergency Operations Plan. Building maps and supporting materials were provided to WCC. In the month, an organizational training will be scheduled.

VIII. Yuhaviataam and other Scholarships

It is scholarship season! The IECF online Common Application went live February 2nd and will close April 15. There are four new scholarships: Guhl and Lewis Medical, Castillo, David Schmidt, and Mountain View Country Club. There are over 30 scholarship funds, and over half are online using the common application.