

We inspire and ignite the health of the Inland Empire



Finance Coaching In-Kind Grant (2025) Executive Summary

Individual financial coaching sessions provided to past IEHP Foundation capacity building grant recipients to strengthen their financial infrastructure and improve their ability to promote positive health outcomes in the Inland Empire. This in-kind grant opportunity will operate as a pilot program in 2025.

Overview

IEHP Foundation (IEHPF) has implemented several capacity building training cohorts for smaller nonprofits since 2023. After analyzing the post-grant surveys and discussing with cohort graduates, the need for individualized support and coaching emerged as a salient theme. In response to the need for financial management support that goes deeper than a class session and acknowledges the nuanced position of each nonprofit organization, IEHPF is launching the Finance Coaching In-Kind Grant (2025).

The Finance Coaching In-Kind Grant (2025) is designed to support nonprofit organizations with small to medium-sized annual operating budgets (above \$300,000) build greater sustainability and an increased capacity to expand their services to help promote positive health outcomes through strengthening their financial infrastructure.

Grant recipients will participate in **an initial financial management assessment**, led by IEHPF Accounting Manager to determine an individual coaching plan and number of coaching sessions needed. **In total, participants can receive up to 8 hours of individual finance coaching over the span of 6 months.** Through these coaching sessions, NPOs will be better equipped to expand their reach, services and resources to help inspire and ignite the health of the Inland Empire through improved financial infrastructure.

While IEHP Foundation will not be providing organizations funding for participation in this training, it is estimated that the training is valued at approximately \$1600.

Coaching Goals & Objectives

The overall goal of the Finance Coaching In-Kind Grant (2025) is to strengthen the financial infrastructure of nonprofit organizations addressing health conditions in the Inland Empire so that they are more competitive and better positioned to leverage additional funding opportunities in the future. This overall goal will be accomplished through an individually tailored coaching plan that helps the organizations strengthen the following financial management domains:

1. **Candid Profile:** The organization has developed a formal, annual process for updating their Candid profile to Gold or Platinum levels.
2. **Budgeting and Forecasting:** Participants have developed a formal budget that is approved by the Board of Directors.
3. **Accounting:** The organization's accounting systems, technologies and processes align with core business needs.

We inspire and ignite the health of the Inland Empire



4. **Financial Reporting for Internal and External Stakeholders:** The organization has established formal financial reporting processes and structures that align with various stakeholder needs, including grant reporting and board meetings.
5. **Financial Policies:** The organization has documented policies for their financial accounting procedures.
6. **Payroll:** The organization has formal processes for identifying contractors vs employees and payments are appropriately paid and reported to tax authorities.
7. **Audits:** If the organization is subject to audit requirements, that the organization is prepared for documentation requirements and auditor selection.
8. **Other:** Other identified items which the organization and the Finance Coach agree to address.

Finance Coach

The assessment and coaching sessions will be led by Steve Ogilvie, Accounting Manager with IEHP Foundation. [Click here](#) to learn more about his background and experiences.

Participant Expectations

There are two requirements for an organization to be considered an engaged partner in the in-kind grant opportunity:

1. **Communication:** As coaching sessions are individualized and there may be additional need for communications, participants are expected to respond to emails received from the finance coach within 7 business days. (The Finance Coach is also expected to respond to emails received from participant within the same 7-business day timeframe.)
2. **Attendance:** Participant attends all scheduled coaching sessions and are present/engaged during the session. If participant needs to cancel a session because a conflict arose, it is expected that the participant informs the Finance Coach about the need to reschedule at the earliest opportunity possible – preferably with 1 business day notice.
 - a. Please note that virtual coaching sessions will take place via Microsoft Teams. If this technology poses a challenge, please communicate with IEHPF staff ahead of submitting your application.
3. **Reporting:** All participants are expected to complete two surveys. IEHPF makes a dedicated effort to streamline the reporting process as much as possible. All surveys must be completed in the Grants Management Portal (GLM).
 - a. **Pre-Survey:** This requirement is satisfied by completing the grant application.
 - b. **Post-Survey:** This survey will be provided to the participant at the conclusion of their coaching session (after the 8th hour of support, 6-month mark or formal last coaching session). The participant will have two weeks to submit the report after receiving access to the survey in GLM.

Failure to complete the grant requirements may jeopardize grant funding or eligibility for future IEHPF grants.

Eligibility and Criteria

We inspire and ignite the health of the Inland Empire



Nonprofit, public benefit organizations with evidence of tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and:

- Have been operating for no less than 3 years.
- Have had an annual operating budget of \$300,000 or more over the past three years
- Have not been classified as a Private Foundation
- Provide direct services and/or engage in advocacy efforts focused on at least one of the following [Vital Conditions for Health and Wellbeing](#).
 - Basic Needs for Health & Safety
 - Humane Housing
 - Meaningful Work & Wealth
- Are headquartered and have a significant presence in Riverside and/or San Bernardino County and who primarily serve **Inland Empire families with children (18 years and younger)** from one or more of the following priority populations:
 - Low-income households and/or those living in poverty
 - Communities of Color
 - Communities furthest from health equity. This includes cities with a Healthy Places Index (HPI) score lower than the 25th percentile. For more information about HPI [click here](#).
 - Communities that are remote or rural
- Have an organizational leader with financial management responsibilities (e.g., CEO, Executive Director, President, Director, Finance Manager) who can commit to meeting with the Finance Coach (virtually) and communicate in a timely manner.
- Organizations who have participated in a past IEHP Foundation capacity building cohort

Selection Process

Grant recipients will be selected on an invite-only basis as part of the pilot round of grantmaking. In total, up to 5 organizations may be selected for the pilot.

IEHPF staff will make their selections after careful consideration of the organization's leader engagement in past grant opportunities/programs and the organizational need for coaching. Additionally, grant program will help expand the **ARCH** of their organizational strength. ARCH includes:

- **Accountability** to funders and community by being operationally efficient through [healthy finances and strong leadership](#)
- **Results-oriented** by striving to achieve results that are identifiable, measurable, and demonstrate progress
- **Connectedness** to community and partnership networks, coalitions and collaborations
- **Health Equity** by achieving measurable decreases in gaps in health equity among IEHP Foundation's priority populations and communities.

We inspire and ignite the health of the Inland Empire



Key Dates

Organizations selected to participate in pilot may begin receiving support in mid-July and run until January 2026.

How To Apply

This in-kind grant opportunity is by invitation only. A grant application will be assigned to selected organizations in the grant management portal by an IEHPF staff member

Communications

Email communications regarding the status of your application will come from IEHP Foundation Grants <administrator@grantinterface.com> or grants@iehpfoundation.org. Make sure both these email addresses are marked safe on your server to avoid communications being blocked or sent to a SPAM folder.

Additional Questions

For any additional questions, comments or accommodation needs, please email Steve Ogilvie, Accounting Manager, at grants@iehpfoundation.org. Please allow 1 – 3 business days for a response.