

**SONOMA VALLEY FUND  
DEVELOPMENT PROCESS  
Drafted April 2, 2015  
Revised June 10, 2015**

1. Development Committee assigns teams to work on their prospect names. Initial teams follow, for adjustment and/or agreement.
2. Each team should meet before the next Board Meeting on 9 July to discuss how they propose to organize their work (meeting cadence, record keeping,) and collect short background paragraphs on each individual or couple prospect on their list as provided by referring board member. These paragraphs should highlight the interests, connections, and capacities of the prospects. Each team creates its own tracking process to manage its list and information gathered from initial and subsequent meetings with prospective donors. This information should be in the form of an email addressed to the sub committee leader and copied to J at [jmullineaux@sonomacf.org](mailto:jmullineaux@sonomacf.org). J will in turn provide us with a monthly summary on activity (that may have to slip to a longer interval, depending on work demands).
3. Each team plans the prioritization of approaches to their prospects. Discussion will concentrate on additional background on the individual names, their general interest in philanthropy (to the extent known by the board member), and why those individuals might be interested to work with and/or channel some of their philanthropy through the Sonoma Valley Fund. Information they develop should also be communicated to J by email. CFSC is interested to support our efforts, and will offer suggestions or support where it seems useful. They also will provide a check that they as well as we are not contacting names without appropriate coordination. I saw that some names on their current list are also on our preliminary list.
4. Development Committee suggests use of attached pages on SVF and CFSC to support initial conversations. Scope of the conversation would cover the Sonoma Valley Fund's mission; it's relationship with the Community Foundation Sonoma County, the nature of the services that the Community Foundation can provide prospective donors. Also one would review current issues and challenges in Sonoma Valley that are benefiting from individual philanthropy, as well as Community Foundation grants and Sonoma Valley Fund grant making,
5. J Mullineaux has offered to lead some training sessions on the products, services and best approaches to use in the development solicitations. More on those later, but would ideally be organized separately for each team so as to provide maximum exposure to all board members.
6. Development Committee teams report at each board meeting on progress. If available, AG will summarize any major items at the Executive Committee meetings in alternate months.

LIST OF POTENTIAL PARTIES TO CONTACT AND INFORM ABOUT SONOMA VALLEY FUND

(This is excluded for now as needs updating)

SUGGESTED TEAM ORGANIZATION  
EACH TEAM HANDLES THEIR PROSPECT NAMES

DEV COM MEMBER	OTHER DIRECTORS	INITIAL NO. OF NAMES (but needs updating)
K BLATTNER	M ITURI, P MAGRANE, J YOUNG	5
A GRANDY	S BRANGHAM, V PISTOLE, W EVANS	6
S SMITH	B HUGHES, M BOLLING, T ELIOT	10
P VAN CAMP	K FULTON, D COLLINS, J RYMER	6