

**Sonoma Valley Fund Governance – Succession Discussion
Responsibilities of the Fund’s President
June 2015**

Strategic Responsibilities

- Facilitate the setting of annual goals in alignment with the SVF Mission (with the EC and Board)
- Lead and work with the Executive Committee and the Board on SVF strategies to meet annual goals
- Lead planning discussions with Executive Committee in preparation for the Board’s bi-annual strategic planning retreats

Board Management

- Create and manage agendas for 6 Board meetings per year
- Create and manage agendas for 6 Executive Committee meetings per year
- Attend selected Standing Committee Meetings:
 - Development (including the annual Board/Advisor Giving Campaign)
 - Grants
 - Governance
 - Community Outreach
 - Marketing/Communications (*when this committee is formed*)
- Meet monthly (approximately) with Committee Chairs to consult on setting and achievement of goals

Marketing/Communications

- Draft Sonoma Valley Fund’s Annual Report
 - Work with Designer on layout
 - Arrange to have Annual Report printed and mailed
- Compose and distribute periodic newsletters to eblast list
- Write personal ‘thank you’ notes to all donors to the Fund
- Periodically speak to outside groups (e.g., Kiwanis, Rotary, ED Roundtable)

Development

- Meet with prospective donors (in conjunction with Development Committee/CFSC staff)

Events

- Introductory speaker at most events
- Support event chair on planning and execution

Serve as SVF Board Member on the Community Foundation Board (although this can be handled by a board member)

- Attend 6 Board Meetings per year in Santa Rosa

Things that Should NOT be done by the President (but are now)

- **Website Management**
- **Marketing/Communications - Writing Press Releases**
- **Event Management**