

Sonoma Valley Fund Development Framework

- Build a sizeable (e.g., \$5M) endowment for Sonoma Valley Fund grant making, in addition to Todd Funds, over a 5+ year timeframe
 - Start with our Board and Advisors
 - Begin public development efforts as our board shows commitment

- Create some capacity for current giving to fund emerging ideas and issues as well as timely needs
 - Because endowments disbursements will be small in the early years (i.e., ~3.75% of the balance)

- Ensure that all of our board members and many more of our advisors finalize their legacy gift plans to include a specific monies for Sonoma Valley Fund disbursement as either fully discretionary or field of interest funds

- Build capacity with a realistic operating budget, raised largely from our board, that will provide adequate support for our activities
 - Possibly to include some administrative/development support

Sonoma Valley Fund Development Framework for 2015

Development Categories	Target	Participation % Goal	2015 Fundraising Goals
Annual Gifts to Operations	Board	100%	\$30,000
	SVF Advisors	25%	\$15,000
	Public	?	\$5,000
Legacy Commitments to SVF <ul style="list-style-type: none"> • Include a gift to the SVF Endowment; or, • Identify a Field of Interest Fund (with SVF as recommending authority) 	Board		10 New Planned Gift Agreements
	SVF Advisors		7 New Planned Gift Agreements
	Public		5 New Planned Gift Agreements
Gift to Support SVF Grant Making <ul style="list-style-type: none"> • Gift to the SVF Endowment or Expendable Funds; or, • Identify a Field of Interest Fund (with SVF as recommending authority) 	Board	25%*	\$50,000
	SVF Advisors	10%*	\$50,000
	Public	None	NA

The goal is for every board member to make at least one gift to the SVF Endowment during their board service and to have a significant portion of Advisors make a gift

And of course we hope that all board members will include other nonprofits in their legacy plans, either through their 'Field of Interest' Fund at SVF or direct gift

SONOMA VALLEY FUND DEVELOPMENT PROCESS

May 2015

1. Development Committee assigns teams to work on their suggested prospect names. Initial team and name lists follow, for adjustment and agreement.

2. Each team meets 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.

3. Each team plans its prioritization. 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.

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. Development Committee and teams report at each board meeting on progress.

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

MAY 2015

<u>NAME</u>	<u>CONTACT (S) AT SVF</u>
Eric Nonacs	Fulton
Nancy and Bill Murphy	Fulton
Sid and Ellen Hoover	Fulton
Dave and Vick Stollmeyer	Iturri
Dave and Grace Meeks	Iturri
Sandy and Joan Weill	Eliot
Darius Anderson	Eliot
Les and Judy Vadasz	Eliot/Weltman/Smith
John Lassiter	Eliot
Dick Cuneo	Eliot
The Robledos	Eliot
The Garcias (Garcia Materials)	Eliot
Eric Gullotta	Eliot
Lew and Bev Perlson	Evans (Emeritus)
Steve and RoseMarie Marks	Evans
Mike and Joanie Buckley	Evans
Tom Landy	Rymer
Holly Bennett	Rymer/Weltman
Michael Woods	Rymer
Susan Lowe	Young
Ethel Daly	Young/Smith
Michael Schuh	Young
Ron and Macy Lawson	Pistole
Dub and Lyn Hay	Pistole
Sam and Carol Murphy	Pistole
Bill Jasper	Grandy
John Wilson	Grandy
Bill and Laurie Hake	Smith
Tom and JaMelle Perkins	Smith
Martha and Steve Rosenblatt	Smith
John and Pam Story	Smith
Steve and Diane Bieneman	Smith
Yvonne Hall	Smith
Les Pinsof	Smith
Harvey Schein	Smith
Ken and Dana Stokes	Collins
Ted and Wendy Hoffman	Collins
Blair and Helen Pascoe	Collins
Jonathan & Marie-Claude Hirschberg	Collins
Doug Braley and Jim Otwell	Van Camp
Denny and Bob Kwellner	Van Camp
Gera Vaz and Randy Reimer	Van Camp

**SUGGESTED TEAM ORGANIZATION
EACH TEAM HANDLES THEIR PROSPECT NAMES**

Development Committee Members	Other SVF Directors	Initial # of Names on List
Kimberly Blattner	Maite Iturri Penney Magranne Judy Young	5
Art Grandy	Suzanne Brangham Valerie Pistole Whitney Evans	6
Scott Smith	Barbara Hughes Mandy Weltman Ted Eliot	10
Peg Van Camp	Katherine Fulton Dennis Collins Joshua Rymer	10

Most Common Charitable Giving Solutions Through SVF & CFSC

Donor Goal	Make a Quick and Easy Gift to Support SVF General Grant Making	Make a Quick and Easy Gift to Support CFSC/SVF Education Initiative	Establish a Directed Fund for Grant Making or Scholarships	Make a Planned/ Legacy Gift	Establish a Donor Advised Fund (DAF)
Donor Benefits	Immediate income tax deduction		Income tax deduction for the years covered by the grants	<ul style="list-style-type: none"> Easy to set up and manage Knowledge that grants will be consistent with donor's wishes Ability to easily/ freely change beneficiaries anytime before death – no cost 	Immediate/in year income tax deduction and ability to direct charitable gifts over future periods
How to Make the Gift	Check made out to SVF or transfer of securities to Community Foundation Sonoma County with instructions re: Sonoma Valley Fund		Check made out to CFSC DAF Name or transfer of securities to Community Foundation Sonoma County	Include charitable gift amounts/ percentage in donor's estate plan and create/sign a Planned Gift Agreement with CFSC	Check made out to CFSC DAF Name or transfer of securities to Community Foundation Sonoma County
Notes	Good to include CFSC in discussion		Minimum fund size may apply	Include Valerie and/ or CFSC in discussion	Include CFSC in discussion



<p style="text-align: center;">Sonoma Valley Fund</p> <p>Sonoma Valley Fund is an affiliate of Community Foundation Sonoma County</p> <ul style="list-style-type: none"> • Founded in 2007 to promote legacy giving in Sonoma Valley and encourage more and better philanthropy • There are currently 16 board members and 35 advisors • Sonoma Valley Fund partners with 21 of the Valley’s nonprofit organizations 	<p style="text-align: center;">Sources and Uses of Operating Funds</p> <p>Sonoma Valley Fund is a completely volunteer organization with no paid staff</p> <p>Community Foundation Sonoma County supports SVF with a \$5K annual contribution and provides some staff support</p> <p>In 2014, Sonoma Valley Fund’s total expenditures were \$13.6K, the vast majority of dollars were spent on:</p> <ul style="list-style-type: none"> • Annual Report (\$2.5K) • Annual Event (\$8K) • Banners (\$1.5K)
<p style="text-align: center;">Grant Making and Legacy Gifts</p> <p>Community Foundation Sonoma County and Sonoma Valley Fund have made over \$2.8 million dollars in grants to nonprofit organizations and scholarships since inception in 2007</p> <ul style="list-style-type: none"> • In 2014 alone, \$520K in grants and scholarships were awarded <p>40 individuals and families have made promises to leave legacy gifts to Sonoma Valley Fund (an estimated \$8.8 million)</p>	<p style="text-align: center;">Opportunities to Support Sonoma Valley Fund</p> <p>There are many ways for donors to support Sonoma Valley Fund</p> <ul style="list-style-type: none"> • Establish a Planned Gift Agreement (Legacy Gift) with CFSC and leave a portion of that gift to Sonoma Valley Fund for grant making • Support Sonoma Valley Fund’s current grant making activities • Create a donor advised fund with CFSC • Contribute to SVF’s Education Initiative