

# Proposal for Data Research, fall-winter, 2016-2017

## From Katherine Fulton and Nancy Ramsey

### Our Proposal and Budget Request

We are proposing to create new baseline information about life in Sonoma Valley, and the private giving that responds to existing needs not met by government or business. Such a baseline would aim to provide new insight about the local landscape that the Sonoma Valley Fund can use to establish our expertise and provoke conversation with key constituencies.

Each of us is willing to volunteer a couple of days a month over the coming months to organize, supervise and interpret proposed research to provide this baseline. However, it won't be possible to proceed without funding to hire research assistance. We are proposing that we draw from the operations fund, for three separate purposes:

1. ***Profiling Sonoma Valley across key issues*** such as demographics, economy, education, housing and health. This would be accomplished by updating the 2011 study done for the Todd Trust, by the Sonoma County Economic Development Board. Updating this will give us a glimpse about what has and hasn't changed over the past 5 years. The SCECD has given us a bid of \$1,130 to update their original study. The dialogue with the SCED has been underway for some time, and given the time sensitivity of the proposal, a majority of the SVF executive committee in August approved moving forward with this updated data set. The resulting document will stand alone and provide value, whether or not the board approves the additional research described below.
2. ***Creating a high-level portrait of philanthropy and the nonprofit sector*** in Sonoma Valley. How many nonprofits are there, and of what type? How much money is raised each year for the major nonprofits, and from what sources? Where does this money go (mapping to issue areas)? To our knowledge, such a baseline portrait has never been created (and will not be straightforward to create). If possible, we would also like to compare this information to other like communities, and would aim to do so if data is available. We respectfully request approval of \$5,000 at the September board meeting to undertake this research. If approved, we will combine this budget with our volunteer time, and see what we can create with this level of funding. Until we have approval and can research consulting options, we won't know the exact cost.
3. Looking ahead, we believe it would be wise to budget up to \$3,000 in 2017 for some ***design, printing and/or communications help***, so that we can

share what we learn in accessible and attractive form. We believe it is premature to vote on this allocation at this time, and recommend delaying until we know what the results of the two data studies warrant and what it could cost to design and disseminate those results. But we want the board to understand that the ultimate cost will likely be more than just the research funding described in points (1) and (2).

*Why this approach, given the rich set of alternatives the board discussed in July?*

This approach was crafted based on extensive outreach and discussion over the rest of the summer. (The full rationale is detailed in subsequent pages, for those who are interested.) Katherine and Nancy met with the senior staff of the Community Foundation and a senior leader of the county health department, involved in research and community outreach. We visited the head of the Napa Community Foundation, who has funded similar research. We also spoke in person to several of our own board members with deep knowledge of philanthropy in the Valley. One of us attended a visioning meeting with the Sustainable Sonoma effort. And we reached out to Impact 100 leaders to begin a dialogue about the research they have done (and not yet done).

All of this outreach helped us face the complexity of creating even a baseline view. But it also intensified our commitment about the usefulness of taking this step. We were especially heartened to learn that a very similar baseline study of philanthropy in Napa a decade ago proved very useful in jumpstarting the foundation's next stage, providing fodder for many conversations and new relationships.

We are NOT proposing that SVF partner with another organization to fund and conduct this research, at this point. That would add complexity and could delay us. We would rather keep the budget relatively low, and consider partnering for deeper research in a potential stage two. We also would like to make this a signature effort of SVF. We believe doing so will produce content that we can use in a variety of ways, giving us more value to add to every constituency (donors and potential donors, advisors, nonprofits).

*We respectfully request that you formally allocate up to \$5,000 for this philanthropy/nonprofits study, in addition to the \$1,130 that the executive committee has already allocated for the Todd study update. The SVF 2016 budget has already allocated \$5,000 for general community programs (such as the forum on Sonoma's future we held last year) that the board has no plans to spend. Therefore, we are essentially requesting that the board re-allocate a bit more than this budget item for research this year rather than programming. Further, we would welcome help from any of you who are interested in joining the team. Certainly, we will need to call on some of you to tap your knowledge, as the research gets underway, including the likelihood of the liaisons reaching out to our partner nonprofits as we aim to gather and understand the data.*

## **More Background: The Rationale**

### **Why?**

Every Sonoma Valley nonprofit wrestles with how to attract the resources to achieve its mission. Our Valley is no different from any other place.

Sonoma Valley Fund exists to strengthen our community through philanthropy. We know we want to grow philanthropy here, and make it ever more thoughtful, building a culture of philanthropy in the Valley that aims for larger impact. And we know we want to build confidence in the Sonoma Valley Fund and the Community Foundation of Sonoma County.

But our board is unsure how best to achieve these goals. Our recent strategic dialogues and actions over the past 1-2 years have experimented with, or generated, many potential options:

- Coaching SV nonprofits to create legacy programs (a program underway).
- Helping the Community Foundation market its services to donors who may want to establish donor advised funds or estate plans (two house parties just this year).
- Engaging the community in dialogue about issues that need to be addressed (through community forums the past few years)
- Building an endowment for Sonoma Valley.
- Raising money for a second stage of the non-profit capacity building grant project, currently funded by the Todd Trust.
- Understanding more deeply from the large SV givers why they give, and what their needs are (a research effort)
- Targeting those who do not yet give, or who have just moved here.
- Working more closely with our advisors.
- Painting a picture of the Sonoma Valley of the future, dramatizing the emerging needs and what must be done to address them.

Any of these could work (and some may in fact already be producing results). But our resources are very limited. It is difficult to fully implement any of these ideas, and our board has not agreed on how to prioritize a course that will move us to the next level of effectiveness.

We propose to help us grapple with this strategic dilemma by building our understanding of SV philanthropy today. We want to test our assumptions about the market we are serving and look for emerging patterns. If successful, we believe this research could help move us to the next level. In addition, we could update the

information at regular intervals and establish ourselves as a go-to resource on philanthropy in the Valley.

## **For whom?**

The first audience for this work is internal—both our board, and the staff and board of the Community Foundation, which is now in the midst of a major strategic process itself. We would use the data to sharpen our focus on the best way to increase effective philanthropy in Sonoma Valley, in partnership with CFSC.

There are many additional audiences. We may find we need to engage with some of them as we DO the research. But certainly, with some data in hand and a sharper sense of how to frame the questions to our constituencies, we could undertake a series of private dialogues with key groups, to hone our understanding. These groups include:

- Our advisors
- Nonprofit Executive Directors, particularly our partners
- Existing major donors in the Valley
- Impact 100 leaders in terms of how we might partner more closely with them
- And those interested but too new to the Valley to have yet become deeply involved in the non-profit scene.

We believe all of these conversations will be more productive and generative if we have some data in hand to share and test with them.

We also believe it is possible that the research could create great fodder for a magazine style article on philanthropy in Sonoma Valley, which perhaps *Valley of the Moon* magazine would be interested in publishing.

We may find that a baseline study begs many questions, and suggests additional, expensive research. We assume we would need to raise money to do that. Therefore, we are recommending a higher level look first, paid for with existing funds. Then we can see if the results warrant additional effort.