



## **WHY SONOMA VALLEY FUND?**

As Sonoma Valley has grown in size and complexity, it has become clear that our community must get better at taking a broad and inclusive view of the Valley's needs and future, supporting and building on the work of many existing, specialized organizations.

Sonoma Valley Fund exists to:

- Help individuals, families and the entire community build the resources and capabilities needed to shape the future of the place we love, by...
- Bringing the best of the Community Foundation of Sonoma County to the Valley.... and bringing the best of the Valley to the Community Foundation of Sonoma County.

***Our Mission:*** Strengthening Our Community through Philanthropy

***Our Tagline:*** *Our Community Our Legacy*

## **OUR LONG-TERM GOALS**

Over the next decade, we will gradually build our track record, our credibility and our visibility, as we want to become a meaningful voice and a trusted advisor for those who seek to grow generosity and to take a proactive stance toward the future.

We seek to do this by:

- Helping Sonoma Valley donors give more and give more effectively;
- Supporting the development of an even stronger and more vibrant nonprofit sector, both through grant making and other means;
- Helping our community preserve the best of today while meeting rising challenges—which requires stepping back from the day-to-day and looking at the inter-related nature of many solutions;
- Maintaining a knowledgeable and committed board to implement all of the above.

### Sonoma Valley Fund – 2016 Action Plan Must Do's/On-Going Work

Lead/Committee	Priority/Action	Q1 '16	Q2 '16	Q3 '16	Q4 '16
<b>Grants Committee</b>	<i>Finish Phase 1 Capacity Building Program</i>				
	<i>Make Phase 2 Capacity Building Grants</i>				
	<i>Plan for Open Space Grantmaking</i>				
<b>Communications/ Marketing Committee</b>	<i>Nonprofit Legacy Initiative</i>			<b>Continue?</b>	
	<i>Annual Report</i>				
	<i>Quarterly eBlasts</i>				
	<i>Press Releases</i>				
	<i>Website Updates</i>				
<b>Development Committee</b>	<i>Cocktail Party/Parties</i>		<b>Continue?</b>		
	<i>Enlarge/Refine Prospect Lists</i>				
<b>Events Committee</b>	<i>Plan for 'Improved' Star Volunteer Event</i>				
	<i>Support Other Nonprofit Education Event (tentative)</i>				
<b>Governance Committee</b>	<i>Recruit New Board Members</i>				
	<i>Plan Board Education Curriculum</i>				
<b>Programming-Content Committee</b>	<i>Create Capacity Building Event for Nonprofits (tent.)</i>				
<b>Executive Committee</b>	<i>Build 2017 Budget</i>				

## Emerging Strategic Priorities

*Retreat participants took a straw poll at the end of the day to determine the cross-cutting issues of importance to SVF's success. There was a strong sense that building SVF's own clarity and capacity is Job One. The following five items won a clear consensus.*

New Priorities/Actions	Observations/Plan of Action
<p>1. Clarify &amp; Strengthen Relationship between CFSC &amp; SVF</p> <ul style="list-style-type: none"> <li>• Leverage in both directions</li> <li>• Determine branding and staffing</li> </ul>	<p><u>Observations</u></p> <ul style="list-style-type: none"> <li>• <i>We do not have the capacity to take all of these on in 2016, in addition to existing "must dos"</i></li> <li>• <i>These priorities cut across the whole organization and may not align with our current Committee Structure</i></li> <li>• <i>Starting with the overall number one priority that emerged at the retreat—working on our relationship with CFSC—seems an obvious place to begin, as so many of the other priorities are related to it. This item 1 is a "gate" that then leads to how we might best approach all the other 4 items</i></li> </ul> <p><u>Plan of Action</u></p> <ul style="list-style-type: none"> <li>• <i>So, we propose tackling the CFSC relationship first</i></li> <li>• <i>Topics of discussion with CFSC include:</i> <ul style="list-style-type: none"> <li>○ <i>Development coordination and support</i></li> <li>○ <i>Staffing support</i></li> <li>○ <i>Grant making coordination/support</i></li> <li>○ <i>Communications coordination</i></li> </ul> </li> <li>• <i>Then, come back to the May Board Meeting with more thinking and having met at least once with CFSC</i></li> </ul>
<p>2. Build SVF Visibility</p> <ul style="list-style-type: none"> <li>• Attend select nonprofit partner events</li> <li>• Increase communications – more eblasts, newsletters and add radio</li> <li>• Reconnect with professional advisors and advisor/friends</li> </ul>	
<p>3. Build an SVF Development Strategy in conjunction with CFSC</p> <ul style="list-style-type: none"> <li>• What are our goals? What products to emphasize? Which beneficiaries?</li> <li>• What is our role alongside CFSC?</li> <li>• Do we want to consider raising a SVF endowment?</li> </ul>	
<p>4. Build Size, Expertise, Confidence and Influence of the SVF Board</p> <ul style="list-style-type: none"> <li>• Review/Revise board recruiting vs. bench list</li> <li>• Develop collateral materials for boards to use</li> <li>• Continue board education with guest speakers, handouts and time at board meetings</li> </ul>	
<p>5. Build Capacity of Sonoma Valley Fund</p> <ul style="list-style-type: none"> <li>• Investigate possible collaborative partnerships</li> <li>• Closer collaboration with CFSC</li> <li>• Addition of staff</li> </ul>	

### **Other Actions Identified for Consideration**

*In the course of the discussion a number of additional ideas were discussed, but with a recognition of our constraints as an all-volunteer organization. The Committees should consider if, and when they can take on these actions items and report recommendations to the board at upcoming meetings.*

- Build prospect list (Development)
- Review Current Nonprofit Organization Partnership Program (Program-Content)
- Design/Launch study of Sonoma Valley needs and issues (Program-Content)
- Hold joint meeting of Grants & Program-Content Committees, to further explore highest impact content for community programming (Grants & Program-Content)