



SONOMA VALLEY FUND

## **WHY SONOMA VALLEY FUND?**

*We live in a place of amazing beauty with a multitude of resources; a large number of nonprofit organizations; and, a deeply philanthropic and volunteer-oriented community. Even with this, our Valley is not a paradise for all residents and faces many challenges. Moreover, our community does not have a separate agency or a commonly accepted approach to address long-term, systemic issues. Sonoma Valley Fund aims to help the community build the capacity needed to successfully shape our future. Therefore:*

### **Our Mission Is:**

*Strengthening Our Community through Philanthropy and Legacy Giving*

### **Our Organizational Concept Statement Is:**

Everything we do is meant to strengthen our community and build communications, connections, collaborations, capabilities, and capacity with our four constituent groups:

- Our Philanthropic Donors
- Our Valley Nonprofits
- Our Valley Community
- Our Sonoma Valley Fund Board, Professional Advisors and Friends

### **Our Core Organizational Principles Are:**

- First and foremost, our long-term focus is 'strengthening our community'. We do this by enhancing effective, local philanthropy with donors, supporting a strong nonprofit sector and engaging the community in discussions about the Valley's future.
- Sonoma Valley Fund is an affiliate of Community Foundation Sonoma County, closely aligned with that organization's goals and strategies. We bring the best of Community Foundation Sonoma County to the Valley, leveraging the resources and talents of our parent organization for the benefit of our local community, and, connecting interested individuals and families to the philanthropic resources and services of the Foundation.

**Our Long-Term Organizational Goals Are:**

- ***Help Sonoma Valley donors achieve their philanthropic goals*** by introducing more individuals and families to Sonoma Valley Fund/Community Foundation Sonoma County
- ***Grow Sonoma Valley Fund's Community Fund and provide effective stewardship for donors' funds***
- ***Build effective, local grant making*** capability in conjunction with CFSC
- ***Support the development of an effective and efficient nonprofit sector*** focused on solving the ever-evolving challenges facing our community
- ***Help the Valley shape its future*** by enhancing understanding of pressing issues and, when appropriate, facilitating progress in creating solutions

***In order to achieve these goals, Sonoma Valley Fund must maintain a knowledgeable board, working efficiently and effectively to articulate the role and value of the organization***

**Our Strategic Concept Graphic**

***Building Capacity For Our Valley, Philanthropic Donors, Nonprofits and Sonoma Valley Fund's Board, Friends and Professional Advisors***



## **BRAND AND ORGANIZATIONAL IDENTITY**

### **Current Organizational Tag Line**

*Your Community. Your Legacy. Taking Care of Both.*

### **Options for Revisions to Organizational Tag Line**

*“Building Capacity in Our Community”*

*or*

*“Strengthening Sonoma Valley’s Future Through Philanthropy”*

*or*

*“Stewards of Sonoma Valley’s Future”*

*or*

*Other suggestions?*

## **APPROACH AND ACTIVITIES IN THE NEAR TERM**

### **Approach**

*The following is a suggested list of activities for the near term (i.e., next 18-24 months). Note that the emphasis is on building our own capacity as a board and continuing our work supporting and funding our nonprofit community. Longer term we want to build our relationships with donors and become more engaged with shaping the future of Sonoma Valley.*

### **Valley Nonprofits**

- Successfully conclude Phase 1 of Capacity Building grant program
- Plan for Phase 2 of Capacity Building grant program
- Plan and launch Open Space Acquisition grants program
- Sponsor or co-sponsor a forum for nonprofits to support capacity building – topic and speaker to be determined
- Create and publish a list of programs in the Bay Area that support nonprofit capacity building
- Implement Legacy Initiative conversations with up to three nonprofit organizations
- Hold Star Award volunteer event in the Fall
- Review nonprofit partnership program in order to improve effectiveness

### **Philanthropic Donors**

- Hold 3 donor cultivation and education events resulting in the introduction of “X” potential Sonoma Valley donors to CFSC/SVF

### **Community**

- Hold at least one community convening that addresses longer term systemic issues

### **SVF Board, Professional Advisors and Friends**

- Build SVF Board’s understanding, confidence and comfort with SVF Identity, Principles, Core messages and Short/Long-Term Goals
- Invite at least 3 guest speakers to SVF Board meetings to address community issues and educate the board about purpose and roles of community foundations so that they can be more articulate about Sonoma Valley Fund
- Encourage all board members to have a conversation with CFSC about creating a Planned Gift Agreement with CFSC that includes a legacy gift to SVF
- Continue discussions about options for building SVF capacity and reach in years to come (e.g., partnerships, staff through CFSC)
- Prioritize new efforts for 2016 and 2017(e.g., community forums, capacity building event for donor or nonprofits, etc.)
- Develop a strategy to engage our Professional Advisor community in support of our work

### **All**

- Clarify and strengthen relationship with CFSC
- Explore partnership opportunities for key activities (e.g., community convenings, non-profit capacity building, etc.)
- Continue to clarify our strategy and develop a medium-term set of goals and strategies
- Update communications materials, as needed, to reflect new strategy and brand work