

Notes from Sonoma Valley Fund Development Committee Meeting

attending:

Chip Allen

Whitney Evans

Art Grandy

Penney Magrane

Michael Mulcahy (by phone)

Lew Perlson

Agenda

--Update on April 12--all in place, but having some dropouts, so will pursue replacements. I personally think now that we should abandon these modest sized home events, as they don't cover many new contacts. Probably expand to a larger format at a venue, which probably won't charge much more than what we now pay for home catering. More on this later, as we also will look at smaller dinner events. Larger/Smaller and drop the middle.

--Plan to train board on AAA of fundraising in May 11, board meeting postponed as J Mullineaux is busy then .

It was discussed that this could be done jointly by J and Michael Mulcahy, at a later date.

--Main item on agenda--Rollout of Sonoma Philanthropy study

1--Need a new name for the study, Hidden in Plain View is a nuance of the work but not descriptive, need something crisp/smart.

Not the role of this committee, just a note to Katherine/Nancy involved directors.

2-First Introduction-- the study first to a meeting of Leadership and Legacy Circles, probably together, tell them we are :

--Revealing this to them first because we want them to see this provocative and informative new line of work by SVF, hopefully to re-involve them

--Asking them for help in talking this up in the community, and ideas of how best to maximize our and the community use of it

3-Second--suggest we have a number of modest size drinks?? events in which current directors and L and L Circles would invite guests to hear and discuss.

If the discussions are large and active, consider having more public type community conversation along the lines of previous one.

4-Then, release publicity about study, so as to have inside group already know, and help with further dissemination--process to Lorna/Donald

The thought was not first to introduce the study in news releases, do it after we have given priority and direct contact with people of interest,

5-Schedule presentations at local service organizations meetings

---10th Anniversary ideas

-With the STAR event in early October, and a yearend party, and several months needed to plan a major event,it seems too tight to have a third event.

An alternative was to combine the anniversary with one of the above, probably the yearend party, which could be in November or December. It would be an easy transition to make the

yearend celebration a recognition of our progress over the years into this new area of information/analytics. A disadvantage of this is that it would be attended mostly by our "family" . The STAR event is less suitable for combination, because we don't want to dilute the focus on volunteerism. But it is more public, so worth a thought.

Another alternative is to have a major public event, probably in Spring 2018, with sponsors (wine industry, maybe others), banquet ticket sales, perhaps a major donor (s?). This could be a money maker for SVF current operations, (ticket sales pay for event, money made from sponsorships), and because is 10th annual celebration, and not an annual event could be seen by other non-profits as not competing for their normal fund raising events . This program would feature our activities, with major focus on this new work.

NOTE--The development committee submits these ideas for input, direction from the EXCOM, and eventually full directors input.