

**FINAL Sonoma Valley Fund  
Building Nonprofit Capacity - Imagine Next Steps  
November 5, 2018  
Prepared by Jill Blair & Karin Demarest**

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Board & Committee Members Present: Simon, Lucy, Karen, Art, Laura, Barbara, Peg, Ted, Nancy, Judy, Molly, Kimberly

Staff & Consultant: Karin Demarest and Jill Blair

### **Summative**

**A) Purpose & Checking In:** The purpose of our conversation was to explore how we are each thinking about ways to build on the Capacity Building experience we had with Cohort One and identify opportunities for go forward action. We began our discussion by checking ourselves in with a statement of what brings us to this conversation. The following emerged during our check in:

- Interest in better understanding the specifics of the Cohort One design, including costs and outcomes;
- A desire to create similar outcomes with more organizations; and,
- A desire to enlist donors in support of capacity building as well as efforts to follow up on the HIPS report.

**B) Cohort One Inspiration:** The inspiration for this conversation came as a result of the October 10<sup>th</sup> meeting during which members of Cohort One shared the following thoughts about next steps:

- Their strong desire for a second Cohort;
- The role they would like to play (limited but contributive) in supporting a second Cohort;
- Their opposition to a Year of Learning open to all; and,
- The provision of fourth year support (modest but enabling) for Cohort One and incorporating a fourth year of support into a Cohort Two design.

**C) Our Discovery Dialogue:** During our discussion we identified the following topics of interest:

- Follow up to HIPS
- Marketing & Messaging Foundation & Valley Fund Accomplishments
- The Future of Cohort One – Sustaining Success
- Understanding the YOL
- Engaging & Educating Donors

- Paying attention to the Valley Fund's purpose as it moves into its next iteration – and ensuring that issues of governance and decision making are aligned with purpose and are clear and coherent.

We had an energetic exchange about each of these and more. Together, we learned the following:

1. While we are eager to extend the outcomes of Cohort One to more organizations as quickly as possible, we understand that the outcomes were achieved as a result of intention: having shared a table over three years; eleven face-to-face professionally planned, facilitated and documented sessions; on-site technical assistance and observations; evolving projects; and peer support. **A different design (inputs) is likely to yield different results (outcomes).**
2. Cohort One made a compelling case on October 10<sup>th</sup> that what made their Year of Learning valuable/impactful was that they were a SMALL GROUP, already selected and committed to deep discovery together. If we were to open such an experience to any nonprofit, without commitment and the opportunity for disclosures and deep connection, we would not achieve the same results. On the basis of this feedback, our discussion veered back to the concept of REPLICATING the Cohort One experience rather than implementing a broader YOL program. And focusing on donor education once we have the results of the Donor Feasibility study.
3. Cohort One's work is not YET over. The project year ends December 31<sup>st</sup> and final reports are due to the Foundation on January 14<sup>th</sup>. We have not yet finished our first experiment.
4. When the final reports come out – they are cause for communication and celebration – donor dinners for example – perhaps board members would like to host such an event and invite Cohort One to join as discussants?
5. Cohort One cost ~\$450,000 over three years, including first year stipends, second and third year project grants, consultant support, venue, food and beverages for the meetings.
6. Both HIPS and the Capacity Building Cohort One experience happened under the auspices of the Sonoma Valley Fund and were contemporaneous with one another, but they are **distinct endeavors and deserving of distinct** strategies.
7. We want the relationships and connections established through Cohort One to be institutionalized and sustainable over time – we need to be intentional in supporting this ambition.<sup>1</sup>
8. It is less staff-intensive to replicate Cohort One with its attendant components (RFP; criteria; organizational assessment instrument; project report formats; consulting support; venue; resources; etc.) than to invent a new approach – even if the new approach is lighter touch with more organizations.

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<sup>1</sup> Jill acknowledged that this was a deficiency in the Cohort One design – addressing the sustaining success aspect of the work. If the Fund initiates more Capacity Building Cohorts, this conversation should be added to the learning agenda.

**D) Our Inclinations:** Approaching our two-hour mark, we were able to identify the following three inclinations:

1. For Jill to convene Cohort One for a SUSTAIN SUCCESS discussion in which we identify the nature of support required to institutionalize the relationships – beyond the personal to maintain connectivity over time. **Action – Jill has scheduled a meeting with Cohort One for December 18<sup>th</sup> from 9:00 – 2:00 p.m.**
2. A desire to convene a Cohort Two during the second half of 2019 that includes a role for Cohort One based on the SUSTAIN SUCCESS conversation. **Action – Karin will put a placeholder in the budget for Cohort Two based on Cohort One expenses.**
3. To participate in helping design the donor feasibility instrument to ensure that questions about HIPS AND Capacity Building are incorporated into the design. **Action – Karin will facilitate this input.**

**E) Our Closing Thoughts:**

*Desire to speed it up and spread it out...  
Great value in hearing different perspectives...  
No more problems...just challenges...  
We are responsible communicators – the story we tell is the story that's told...  
Looking forward to sustaining success...  
Bullish...  
Excited by the discussion and direction...  
Great...  
With all the changes ahead – we have great opportunity – good moment...  
Yay for having a second Cohort...*

Going out into the world – while the specifics of our conversation are confidential the sensibility is not: We are excited to:

- Work together;
- Improve the health and welfare of our community;
- Strengthen our nonprofits; and,
- Build better and lasting connections between and among those who do the work on the ground and those who support the work to be done!