Executive Summary

Valley Vision is approaching 2017-19 with unique capabilities, a new strategic framework, and a track record of operational and financial success. These key components will bring about new growth for Valley Vision and advance long-term regional goals that achieve our purpose of making the Capital Region communities the most livable in the nation.

Our Place in the Region

Valley Vision excels in community-based problem-solving, using research and the power of public-private partnerships to drive results. We believe in collaboration. We value inclusion. We engage community members in helping design solutions to problems that affect them and their families. We harness the power of data and measurement to confront some of our most persistent economic, social, and environmental challenges. We are among few regional agencies that take a long view, anticipating what the future might bring, and planning for it now. And we’re trusted to deliver.

Growing

Valley Vision’s 2017-19 growth agenda includes strengthening and enhancing our core operations, geographically expanding our impact area beyond the Capital Region into surrounding counties, and seizing emerging opportunities to leverage our resources and relationships.

Focusing

Valley Vision will pursue six strategic goals to improve the region’s livability:
Valley Vision Strategy Areas

**Leadership and Civic Engagement**
An environment that cultivates and rewards Civic Engagement and Civic Leadership by building regional leadership capacity and increasing leadership opportunities, both within and outside the region, to achieve our highest potential. Board-Driven Initiatives will advance this strategy.

**Healthy Communities**
Healthy Communities that enable all residents to reach their full potential by having equitable access to healthcare, healthy food, transportation, housing, and economic opportunity.

**Food and Ag Economy**
A robust regional Food and Ag Economy that provides adequate and healthy food for our residents, and is environmentally sustainable and economically viable.

**21st Century Workforce**
A talented, 21st Century Workforce that gives our region a competitive advantage, meets employer needs, and provides our workers’ pathways to high-quality jobs through skills-building.

**Clean Economy**
A Clean Economy that minimizes reliance on carbon-based products, services and practices, is increasing action steps to adapt to climate change, and is promoting environmental sustainability.

**Innovation and Entrepreneurship**
A diverse regional economy that supports and prioritizes Innovation and Entrepreneurship.
Delivering

2017 income is projected at $2.5 million. We forecast 2018 income to be in step with 2017 or higher. We are sharpening and updating our core business practices to match new strategic and growth objectives, including utilization of an Innovation Fund and taking proactive policy stands informed by data.

We introduced a new communications strategy in 2017, completed with a brand and website refresh; shifted our long-standing awards program; short-listed new office space for move-in in 2018 that reflects our culture and values; and activated new evaluation practices that ensure adaptive learning and maximize effectiveness. In 2018 we will leverage our new strategic partnership with the Institute of Social Research at Sacramento State, sharing public opinion insights to inform public-policy making on key issues; step out and take stands on critical public policy issues affecting the quality of life of this and future generations; and help drive with our partners widespread agreement around a few core regional priorities to galvanize action.

To learn more about how Valley Vision’s work is helping to make our communities the most livable in the nation, visit us at valleyvision.org.
Introduction

This Business Plan lays out organizational structure, leading strategies, and outcomes covering three years; 2017 through 2019.

Valley Vision was formed in 1994 in the context of a national regionalism movement – the idea that the issues that impact people’s lives do not fall along jurisdictional lines or in distinct silos. Addressing these critical and complex issues must involve a shared vision, commitment, and collaboration among public, private and nonprofit entities and across larger geographic scales.

Regional stewardship remains a Valley Vision guiding principle in service of our purpose to make California’s Capital Region communities the most livable in the nation. We will achieve impact by engaging regional leadership, delivering independent research, and designing and driving multi-stakeholder initiatives that build a shared agenda, use common metrics, and drive outcomes-based action. As a triple-bottom-line organization, we seek to improve economic prosperity, environmental sustainability, and social equity.

The regional challenges we face today are more complex than ever before. The region is greatly impacted by increasing interconnectivity through movement of products, technology, people and information, as well as other global challenges such as water and energy resource constraints. Recognizing these challenges, Valley Vision has evolved its capabilities and expertise to steward the region through different and complex times. Effective regional stewardship requires innovative thinking and an entrepreneurial mindset for creative and effective solutions. Valley Vision brings this type of mindset to 2017.

WE HAVE BUILT WITH OUR COMMUNITY PARTNERS A STRONGER VALLEY VISION GEARED TO ACHIEVE RESULTS. WE DO THIS WORK, NOT FOR A NARROW INTEREST, BUT ON BEHALF OF ALL PEOPLE WHO CALL THIS REGION HOME.

“Regional stewards are integrators who cross boundaries of jurisdiction, sector and discipline to address complex regional issues such as sprawl, equity, education and economic development. They see the connections between economic, environmental and social concerns and know how to “connect the dots” to improve their regions.”

– Alliance for Regional Stewardship, 2006
1. **CATALYST**: Valley Vision is often first-in on un-addressed regional issues – developing knowledge and networks to take action.

2. **REGIONAL STEWARDSHIP**: Enabled by its purpose, values, business model, and approach, Valley Vision is designed to serve as a trustee and steward of the region. We look out for everyone’s interest.

3. **COLLECTIVE IMPACT**: Most complex, multi-faceted challenges must be addressed by many and met with diverse perspectives and approaches to uncover breakthrough ideas. Valley Vision designs processes that everyone has a role in, and responsibility to, reaching long-term and broad-benefit solutions.

4. **TRIPLE-BOTTOM-LINE FOCUS**: A balance across economic prosperity, environmental sustainability and social equity drives our business model and informs our decision-making.

5. **WICKED PROBLEM-SOLVING**: Complex, boundary-crossing issues that involve sometimes hundreds of stakeholders are labeled by social scientists as “wicked problems” – the hardest of all to solve. Valley Vision is designed to address wicked problems that emphasize iterative learning, clear communication, community engagement, enlistment of champions, evidence based decision-making, and performance measurement.

6. **LEADERSHIP ENGAGEMENT**: Valley Vision regularly engages with a diverse network of thousands of civic leaders through events, projects, and communications, and harnesses the power of our 30-member VIP Board.

7. **PUBLIC OPINION POLLING**: In 2017, Valley Vision began a partnership with Sacramento State’s Institute for Social Research (ISR) to generate public opinion research on pressing regional issues. The information gained will guide our policy agenda and influence regional decision-making.

8. **TAKING STANDS**: As of 2016, Valley Vision now takes stands on carefully selected regional policy topics, using data and evidence to inform our positions.

9. **INNOVATION FUND**: Valley Vision’s new Innovation Fund can be directed toward important regional activities where no ready sponsor exists.
services
Valley Vision offers 10 services that, when combined, create a powerful value proposition to deliver breakthroughs for the communities and clients we serve.

## NETWORK DEVELOPMENT, MANAGEMENT AND COALITION BUILDING

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder engagement</td>
<td>Create partnerships, build and grow coalitions, increase collaboration and communication.</td>
</tr>
<tr>
<td>Process design</td>
<td>Determine desired outcomes, workflow, project needs, and implementation requirements.</td>
</tr>
<tr>
<td>Meeting Facilitation</td>
<td>Expert facilitation. Create agendas, support materials, design and manage meetings.</td>
</tr>
</tbody>
</table>

## DATA-DRIVEN PROBLEM SOLVING

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research &amp; Public Opinion Polling</td>
<td>Quarterly public opinion polls on pressing regional issues. Research studies, best practice studies, literature reviews, focus groups, stakeholder opinion assessments, surveys, data synthesis (partial list).</td>
</tr>
<tr>
<td>Expert evaluation</td>
<td>Analyze desired impact of efforts to generate learning and adjust approaches in real time.</td>
</tr>
</tbody>
</table>

## REGIONAL CAPACITY BUILDING

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counsel</td>
<td>Provide objective advice. Frame or re-frame opportunities, problems, or solutions. Generate options. Resolve disputes.</td>
</tr>
<tr>
<td>Task execution</td>
<td>Execute work assignments often where capacity or expertise is lacking.</td>
</tr>
</tbody>
</table>

## ELEVATING REGIONAL ISSUES

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>Solicitation, investor relations, grant writing.</td>
</tr>
<tr>
<td>Communications and Storytelling</td>
<td>Internal group communications and external group and stakeholder communications, including telling a compelling story.</td>
</tr>
<tr>
<td>Media relations</td>
<td>Reactive and pro-active strategy and execution. Serve as initiative spokesperson.</td>
</tr>
</tbody>
</table>
Growth Strategy

Overview

2016 was a transition year, marking the end of a period when new organizational enhancements were installed to improve efficiency, budget performance and reporting, and board member involvement. At the same time, new practices, tools and capacities were added to expand Valley Vision’s influence and impact. These enhancements include creation of a new board-directed Innovation Fund to pursue worthy community-improvement initiatives, the capacity to take public policy stands using data and evidence, and the use of public opinion survey research through a unique partnership with Sacramento State to shape decision-making and policy priorities at a regional scale.

These third generation improvements, or “Valley Vision 3.0” for short, were fully leveraged beginning in 2017 to improve regional outcomes. To optimize this third generation footing, the proposed growth strategy centers on efforts to (1) continue to strengthen the core; (2) continue to grow the geographic footprint of the organization; and (3) seize emerging opportunities.

1. Strengthen the core

   STAFF RELATED

   o New "generative mindset" focus in staff training for improved project cultivation, business generation, and creative problem-solving;
   o Sharpening of management and staff roles to drive higher contributions and greater team and role alignment;
   o Continual staff development using "leadership accelerator" curriculum, piloted for planned external use;
   o Consistent with cost-effective management practice, consultants or new hires will be brought on as required to meet higher capacity requirements with a net revenue neutral to positive effect, based on conditions.

   OPERATIONS & FINANCE

   o Full migration and optimization of Mavenlink budgeting, labor allocation, and project management software; matched to other software tools that unlock new capabilities;
   o Process and budgeting improvements creating step-wise progress towards the goal of project engagements fully supporting direct and indirect costs to the organization; and
   o Beginning in 2017, directing annual board dues towards Board-directed investment priorities.
PLACE STRATEGY

- Utilize new office / meeting space to communicate culture and values;
- Create a community gathering space for collaborative processes;
- Align our workspace to our work needs; and
- Leverage the new space for additional earned-income revenue opportunities.

NEW POSITIONING ENHANCEMENT STRATEGY

- Utilizing a capacity grant valued in excess of $65K from Sutter Health enabled 3fold Communications to assess and re-position Valley Vision with upgraded brand, communications and marketing tools and strategies.

2. Geographic Expansion

NORTH SAN JOAQUIN VALLEY

(Defined as a 3-county region, including the counties of San Joaquin, Stanislaus and Merced)

- Diversifying geo-related projects and revenue sources, requiring staff expansion in new Huddle workspace in Stockton beyond 1.5 full-time employees today. Hiring a "director" position during this planning period to oversee office and production, and to grow practice; and
- Maintain and deepen community advisory board utility of leaders representing triple-bottom-line interests from the public, private, and civic sectors, chaired by President Eibeck.

SOLANO COUNTY

- Recruit and launch a new community advisory board of leaders representing triple-bottom-line interests from the public, private and civic sectors, chaired by Louise Walker; and
- Establish and diversify geo-related projects and revenues sources, requiring enhanced staff activity in the county.

3. Seizing Emerging Opportunities

- Seek opportunities to expand Valley Vision’s engagement and activism in Yuba and Sutter counties and points north in the Sacramento Valley where there is a strategic and programmatic fit;
- Leverage existing and new foundation investments, grants and philanthropic opportunities for regional advantage;
- Seek expanded relationships with in-state and out-of-state foundations to advance regional priorities, especially for the Urban Jobs Initiative;
- Grow existing political and government relationships to align activities and maximize limited resources, leveraging the new public opinion survey research where possible; and
- Other “discovered” opportunities that emerge.
Action Strategies

As a regional stewardship organization, setting a long-term vision and regional agenda is not only a core competency, it is a critical role in the region. A long-term agenda clarifies our values, aligns diverse regional interests, and frees us to reach greater impact together. 

**Long-Term Outcomes** and **Long-Term Success Metrics** can be accomplished collectively. By working together, the region can strive to achieve them in the long-term.

The following Theory of Change is a model that describes how Valley Vision’s strategies relate to our long-term impact and overall mission.
Overarching Strategy: Civic Engagement + Leadership

Long-Term Outcome: Increase Valley Vision’s leadership position and the level of civic engagement on important social issues.

As the steward for the region and at a time of significant leadership turnover, Valley Vision is uniquely positioned to guide decision-makers to address some of the region’s most pressing challenges. During 2017-19 we are more prepared than ever to galvanize Board leadership and influence through the Innovation Fund, new action informed through polling, and taking stands. Valley Vision will activate leadership capacity through Board-Driven Initiatives. We will also increase civic capacity through events, polling and engagement, cultivating leadership in the region.

Key 2017-19 Actions
Actions that Valley Vision will pursue

- Activate and maintain Board-Driven Initiatives (see details below).
- Conduct regular scientific public opinion polls annually in partnership with Sac State.
- Host a series of community forums to amplify public poll results and foster community discussions.
- Leverage Valley Vision’s board leadership to champion and elevate priority issues.
- Serve in a senior leadership position to guide, direct and maximize statewide activity as demonstrated by the California Stewardship Network (CSN).

Key Outcomes for 2017-2019
Outcomes resulting from wide-ranging actions

- Increase leadership and engagement through strategic and data-driven board action (see details below).
- Increase VV’s role as a trusted regional steward from public insight through opinion polling and other activities.
- Increase authentic public engagement through unique regional VV events.
- Position VV and its board as the preeminent leadership organization for triple bottom line-oriented change.
- Advance the work, reputation and effectiveness of regional stewardship through CSN.
2016-17 Board-Driven Initiatives

The Board of Directors began to take positions in 2016, and direct resources toward high-impact activities where Valley Vision could add value. Board initiatives reflect regional long-view goals based on data. Actions to support board initiatives are threaded throughout Valley Vision’s overall strategies and tie directly into the organization’s purpose and goals.

Urban Jobs Initiative

In a landmark action, the Valley Vision Board voted unanimously on September 27, 2016, to commit the organization to reduce economic insecurity in the Capital Region over the next 10 years based upon data from the Community Health Needs Assessment (CHNA).

As a result, the board agreed to launch this place-based initiative to address rising urban poverty primarily in disadvantaged communities where concentrated poverty is highest. A collaborative, multi-stakeholder approach to set a common vision, align resources, undertake tasks, and measure and evaluate results is required; Valley Vision is well suited. A phased, multi-year process that emphasizes community involvement and an unprecedented level of partnership uniting government, foundation and business-related activities will be initiative cornerstones.

Improving Transit in the Region

In 2015 the Valley Vision Board recognized the importance of improving transit service across the six-county region. Valley Vision recognizes the critical relationship between transportation and quality of life. We are pursuing strategies, including conducting public opinion polling, advancing and supporting a regional prosperity plan, and assisting Sacramento Regional Transit as they work to fulfill regional transportation needs.

An “Epic Trail”

In spring 2016, the Valley Vision Board agreed to spark a series of stakeholder discussions across the region to rate local government, business, and community interests in connecting the El Dorado County trail system to the American River Bike Trail, with additional connections into Davis and beyond. The result would be a contiguous 100-mile-long, multi-use trail that would be “epic” in length and quality, providing a distinct athletic, health, and marketing asset to the region. We are advancing a feasibility analysis while continuing to build support for the trail.
Important notes:

✓ The Urban Jobs Initiative is a new, long-term approach to regional change-making. While Valley Vision has not attempted something of this scale or duration before, we will draw upon proven strategies in other parts of the country and state and adapt and apply to improve impact.

✓ These Board-driven strategies fully harness the knowledge and investments of past and present Valley Vision activities, from work with nonprofit healthcare systems to workforce development agencies and local and state governments, to accelerate the change process.

Long-Term Success Metric DESPITE UNPRECEDENTED TURNOVER IN KEY REGIONAL LEADERSHIP POSTS, CROSS-SECTOR COLLABORATION AND JOINT PROBLEM-SOLVING BECOMES THE NORM.

Healthy Communities Strategy

Long-Term Outcome: Advance opportunities for all the region’s residents to reach their full potential by ensuring access to basic needs, including economic security, housing, transportation, safety, community amenities, health care and healthy foods.

To make the region the nation’s top livable community, all residents must first have basic needs met. The Capital Region must enable all residents to attain economic security and access to housing, transportation, community amenities, safety, needed health services, and healthy foods.

Valley Vision has an in-depth view of health conditions in the region through multiple initiatives and many years of conducting research and building relationships with health systems and broader community. Most recently, Valley Vision completed 16 Community Health Needs Assessments (CHNAs) across nine counties, uncovering the most pressing health needs of the region.

Key 2017–19 Actions
Actions that Valley Vision will pursue

- Release overall findings and recommendations on research

Key Outcomes for 2017–19
Outcomes resulting from wide-ranging actions

- Communicate, translate, and track
conducted through 2016 CHNAs and help implement recommended actions where feasible.
- Work with the five not-for-profit health systems to conduct the 2019 CHNA.
- Execute a 10-year project – the Urban Jobs Initiative – that will target concentrated poverty in Sacramento County.
- Launch supportive activities that reduce homelessness in the region.
- Manage the regional broadband consortia to support regional connectivity and essential services.

**Long-Term Success Metric** IMPROVE THE QUALITY OF LIFE IN NEIGHBORHOODS CURRENTLY AFFECTED BY CONCENTRATED POVERTY BY INCREASING SERVICE LEVELS, INVESTING IN THOSE NEIGHBORHOODS, AND REDUCING THE NUMBER OF CENSUS TRACTS IN CONCENTRATED POVERTY BY 10% IN 10 YEARS.

**Food and Ag Economy Strategy**

**Long-Term Outcome:** Increase food security and strengthen the supports for an economically-viable and environmentally-sustainable regional food system.

As the Farm-to-Fork Capital of the nation, food production is critically important to the Capital Region’s way of life and economy. Valley Vision has a long history working across the region on a variety of food system initiatives, and is known as a regional leader in food, agriculture and health systems. Our regional initiatives focus on pioneering innovations to make food and ag sustainable, healthy, productive and accessible.
Key 2017–19 Actions
Actions that Valley Vision will pursue

- Implement Central Valley AgPlus (IMCP) goals; convene a funders’ forum, establish a regional healthy food finance fund, and other actions.
- Advance the implementation of a Food and Agriculture Action Plan for the City of Stockton.
- Assist Sacramento City Unified School District in implementing a School Wellness Policy that emphasizes consumption of healthy foods.
- Pilot innovative approaches in the regional food system in such areas as rural broadband, reducing food waste, and increasing food access to underserved communities through projects such as the Yolo County Ag Tech Pilot and CropMobster.

Key Outcomes for 2017–19
Outcomes resulting from wide-ranging actions

- Increase value in our food system by improving the food and beverage manufacturing ecosystem throughout the Central Valley.
- Support implementation of the City of Stockton’s Food and Ag Action Plan.
- Develop a plan to implement Sac City USD wellness policy across all schools in the district.
- Provide access to funding opportunities and network connections for food and beverage manufacturers and the supply chain, including underserved populations such as rural, small-business owners.
- Document broadband infrastructure importance in rural areas to change policy and increase investments.

Long-Term Success Metric
CURRENTLY MORE THAN 500,000 INDIVIDUALS IN THE CAPITAL REGION ARE EXPERIENCING FOOD INSECURITY. BY 2027 THIS NUMBER WILL BE REDUCED BY 20%.

21st Century Workforce Strategy

Long-Term Outcome: Increase regional economic prosperity by strategically aligning skills development and educational opportunities using pathways to high-quality jobs.

To maintain a vibrant and prosperous economy, it is imperative that our region has a talented workforce — educated, trained and ready for emerging opportunities in the 21st century economy.
Valley Vision is a trusted partner to our regional Workforce Development Boards, regional community colleges and universities, employers, and many others, and has provided notable contributions to our region’s workforce development efforts for years. As project manager for Next Economy starting in 2011, Valley Vision oversaw the development of the implementation plan and is advancing Next Economy implementation through our current and planned activities.

**Key 2017-19 Actions**  
Actions that Valley Vision will pursue

- Partner with Align Capital Region to develop Alignment Teams, meaningful employer engagement, and robust educational pathways.
- Identify high priority actions for skill gaps and pathways by re-convening cluster teams and continuing work started in 2016, including conducting additional cluster analysis.
- Work with Sacramento Mayor Steinberg to foster internships and other workforce training opportunities.
- Develop a strategy for employer engagement, including small businesses, based on a social network analysis of employers’ engagement on Advisory Boards.
- Train teachers on integrating technology into instruction and assist parents in getting connected to broadband.

**Key Outcomes for 2017-19**  
Outcomes resulting from wide-ranging actions

- Identify and communicate where educational pathways are needed.
- Align pathways with employer needs by increasing coordination among employers/education/workforce systems.
- Increase number of internships and work-based opportunities.
- Re-align and design processes for regional employer educational and organizational Advisory Boards and increase small business participation.
- Increase number of classrooms participating in School2Home program; train more students and parents in digital literacy.

**Long-Term Success Metric**  
INCREASE THE PERCENTAGE OF THE POPULATION WITH A POST-HIGH SCHOOL CERTIFICATE OR DEGREE TO 45% BY 2027.
Clean Economy Strategy

Long-Term Outcome: Reduce carbon emissions through multiple regional strategies, meeting or exceeding state greenhouse gas emission reduction goals to adapt to climate change.

A key aspect of livability in our region is a clean environment, which requires environmentally-sustainable practices for public and private entities. Valley Vision has a strong legacy of work in the Clean Economy – the sector of the economy that produces or supports goods and services that provide an environmental benefit. Starting from Valley Vision’s involvement with SACOG on Regional Blueprint in 2003, we have championed urban growth patterns and transportation practices that minimize carbon emissions. We also have a track record of supporting workforce development and economic activity that supports the Clean Economy sector.

Key 2017-19 Actions
Actions that Valley Vision will pursue

- Leverage our Clean Economy work in North San Joaquin Valley to benefit other partners and jurisdictions drawing tighter linkages across our service area.
- Support improved air quality through public/private coalition building, outreach/communications, and policy forums and advocacy.
- Help regional stakeholders advocate for well documented and justified investments in the region, especially in Disadvantaged Communities, through the State Cap-and-Trade program.
- Provide assistance to local jurisdictions in rural areas of San Joaquin and Stanislaus counties in implementing Climate Action Plans.
- Support clean innovation in the realm of alternative fuels and vehicles, energy efficiency, and emerging clean industries.

Key Outcomes for 2017-19
Outcomes resulting from wide-ranging actions

- Build Clean Economy stakeholder base in North San Joaquin Valley, growing the size of the portfolio of Clean Economy work (measured by revenue) and the geographic reach.
- Establish increased awareness and shared commitment of air quality issues and grow the network of clean air stakeholders, including public and private entities.
- Advance key carbon reduction actions
- Increase Climate Action Plan implementation activities in San Joaquin and Stanislaus Counties.
- Increase the region’s standing in clean innovation activities through supporting and promoting clean technologies.
**Long-Term Success Metric** THE CAPITAL REGION WILL REDUCE CARBON EMISSIONS 7% BY 2020 AND 16% BY 2035 BELOW 2005 LEVELS.

**Innovation + Entrepreneurship Strategy**

**Long-Term Outcome:** Diversify the regional economy with a growing number and mix of entrepreneur-led companies.

Innovation and entrepreneur-led economic activity is an important source of economic diversification and growth for any region. Expanding entrepreneur-led activities can increase cultural tolerance for business and economic risk. Innovation and entrepreneurship contribute to our region’s livability. Diversifying our economy by providing economic opportunity for residents builds our reputation as a home to successful, thriving startups. This improves our national reputation and lends to vibrancy and increased marketability. Valley Vision has a growing body of work in innovation and entrepreneurship, and can leverage significant staff expertise for future growth.

**Key 2017–19 Actions**
Actions that Valley Vision will pursue

- Support the regional Workforce Boards’ implementation of SlingShot, an effort to strengthen the regional entrepreneurship ecosystem.
- Assess and establish regional impact investing funds linked to existing Valley Vision priorities, including food and ag and the Urban Jobs Initiative.
- Increase coordination and cooperation in the sector through iHub-based engagement.
- Partner with the Sacramento iHub and

**Key Outcomes for 2017–19**
Outcomes resulting from wide-ranging actions

- Active engagement as a trusted and valued partner in the innovation and entrepreneurship sector.
- Implementation of one or more regional impact investing funds, bringing additional capital sources to the economy.
- Bring greater coherence to the entrepreneurship support system through iHub, SlingShot and other engagement.
GO-Biz to create a regional partnership of peers.
- Explore opportunities in the Stockton / San Joaquin County area.
- Serve as host for the 10th round of the A.C.E. program in the fall of 2018.
- Growth in the size of the portfolio (measured by revenue) and in the geographic reach of its work.
- Win the federal A.C.E. designation for fall 2018.

**Long-Term Success Metric** INCREASE THE NUMBER OF STARTUPS PER 1,000 FIRM-POPULATION (“STARTUP DENSITY”) AND THE RATE OF STARTUP GROWTH IN EMPLOYMENT OVER FIVE YEARS, DEMONSTRATING BOTH STARTUP VOLUME AND LASTING IMPACT.
Valley Vision Business Practices

Valley Vision has developed a sustainable financial structure to support the work we do. Valley Vision is a non-profit, a 501(c)(3) tax-exempt organization formed to secure the social, environmental and economic health of the Sacramento Capital Region. Under this status, Valley Vision is organized and operated exclusively for exempt purposes set forth in section 501(c)(3) of the Internal Revenue Service’s tax code, and none of its earnings may inure to any private shareholder or individuals. See more Business Practices details in Addendum A.

**BILLABLE RATES**
Maintain flexibility and contribute to organizational reserves by using billable rates that account for staff wages and benefits, routine project expenses, agency administrative costs.

**NEW PROJECT GENERATION**
Respond to unmet needs in the region by identifying projects through research, engagement, and/or relationships; or respond to requests by external organizations to initiate action.

**PROJECT PLANNING + COSTING**
Establish project budgets and implementation schedules by conducting internal assessment to identify appropriate time, staffing and hard cost allocation.

**PROJECT IMPLEMENTATION**
Optimize project implementation by using project management software, Mavenlink to track timelines, task progress, and staff hours.

**SELF-SUSTAINING PROJECTS + INNOVATION FUND**
Advance Valley Vision’s independence as a research and leadership change organization through complete project revenue sustainability and use of board donations and other fundraising to pursue strategic priorities.
Operational Plan

Communications

Four overarching communications strategies will help drive successful outcomes of the Business Plan. The communications strategies are intended to:

- Boost awareness and understanding of Valley Vision’s work and impact
- Amplify key initiatives and outcomes
- Stimulate community conversations on tough topics
- Increase influence with regional leaders and decision makers, both within the region and throughout the state

The four communications strategies are:

1. **Transform Valley Vision’s brand in alignment with its distinctive value and unique regional benefit**

Formulate and leverage an identity package and message strategies that clearly, concisely and effectively describe the organization’s purpose, impact and relevance. Rebranding will amplify Valley Vision’s image and leverage its brand and assets to increase the organization’s prominence.

2. **Energize and modernize organizational communications**

Valley Vision will design and execute an integrated communications strategy that maximizes modern technology tools in order to expand reach, increase understanding, strengthen networks, and increase prominence.

3. **Assert news media strategies**

Valley Vision will leverage the news media to broadly communicate the substance, uniqueness and virtues of the organization’s work, public stances, and regional policy and issue-based research.

4. **Intensify digital media presence**

Valley Vision will more effectively utilize digital media to broadly and effectively communicate with new audiences more frequently and powerfully. This includes social media channels like Facebook, Twitter, Linked-In, internal and external blogs and online journals, as well as Valley Vision’s own internal channels including website and eNewsletters.
Staff Development

Staff are Valley Vision’s key asset. Cultivating and sharpening skills must be an ongoing point of emphasis. Valley Vision will pursue several key activities to foster staff development.

1. **Leadership Accelerator**

Valley Vision has designed and will implement a Leadership Accelerator initiative targeted to junior level staff, but open to all. The Leadership Accelerator is intended to develop leadership capacity for staff and to teach “the Valley Vision way” – the unique characteristics required to embody Valley Vision’s value proposition. The series of interactive trainings offer a variety of essential business, community development, and civic leadership functions. The trainings also address both conceptual approaches and practical application.

2. **Staff Performance Review**

Valley Vision has moved away from an annual performance review process in favor of a more continuous feedback loop. The intent is to build a more definitive approach to providing real time feedback to staff. Through this structure, managers and subordinate staff formally meet at least once per month. In those meetings, (a) Managers are to identify at least one commendable feature and one development opportunity for the subordinate staff and reciprocally, (b) subordinate staff are to identify at least one commendable feature and one development opportunity for the manager. The assessments are documented and placed in the employee file. While the meetings are to take place at least monthly, the interaction is encouraged to take place whenever development or congratulatory opportunities are encountered.

3. **Competency Training and Development**

Valley Vision’s proposed budget for 2017-19 includes funds dedicated to support staff development. These funds would be available to staff on a case-by-case basis to participate in trainings, conferences, and other skill- or knowledge-building activities. To access the development funds, staff would propose the activity to senior management who would assess it for applicability to project and agency and anticipated return on investment. All staff attending external development functions shall report back on key learnings at a subsequent staff meeting.
Evaluation

In order to achieve our desired impact on complex and collaborative regional problems, Valley Vision must be robust and innovative in evaluating our projects and our organization. Evaluation guides our knowledge of project and organizational effectiveness, and also informs strategy and continuous learning about the impact we achieve. Evaluation is a critical component of collective impact approaches, as well as long-term outcomes-based action.

Valley Vision will enact new and more rigorous evaluation practices in 2017-19. We have developed a new Director of Strategy and Evaluation position to enhance use of evaluation across the organization. We will put four primary strategies in place:

1. Design evaluation measures into all new projects

   Evaluation is most effective when designed into a project from the very beginning. Further, the iterative learning that is required in many of our initiatives requires an evaluation process designed alongside project implementation. This is known as developmental evaluation, or “real time” evaluation and employs methods that assess actions as they are being implemented to enable course correction as projects advance.

2. Track and report on outcomes within each strategy

   Valley Vision is adopting an outcomes-based approach for our core strategies. As a part of each strategy, key metrics and indicators will be tracked and communicated to stay on course. Tracking practices for Business Plan implementation will also be put into place and reported on throughout the year. Additionally, through evaluation measures we will be assessing the appropriate performance dashboard indicators and displays to inform the board of organizational project performance.

3. Increase evaluation tools for staff across all projects

   Each project should have an evaluation toolkit to ensure that stakeholder feedback and metrics tracking is occurring across all projects. Valley Vision will develop and train all staff with new evaluation tools in 2017-19.

4. Bring in new evaluation projects

   As evaluation becomes a stronger core competency of Valley Vision, we will seek new evaluation projects that fit within our strategy platform.
Organizational Chart

Valley Vision’s staff model is now structured to fully achieve the strategic objectives described in this Business Plan. These adjustments better reflect Valley Vision’s approach to work and ensures that the right talent will support and advance projects that maximize impact. The new staffing model will be adopted in 2017-19.

**Valley Vision’s staff model includes the following job functions:**

Chief Executive, Managing Director, Finance Director, COO / Production Director, Communications Director, Director of Strategy and Evaluation, Project Leader (PL), Project Manager (PM), Project Associate (PA), Executive Fellow, and Interns.
Financial Performance History 2013-2016

Valley Vision has experienced significant revenue growth since establishment 23 years ago, and has developed a long track record of financial sustainability and sound fiscal decision-making. Our funds come from government at all jurisdiction levels, utilities, universities, local and state foundations, local businesses and other non-profits. There has been a steady growth in revenue over time, but between 2013 and 2016 Valley Vision saw a substantial growth in revenue of nearly 40%, from $1.6 million to ~$2.3 million.

Over this same period, Valley Vision has instituted goals to establish a prudent reserve to ensure additional stability for the organization. The Executive Committee set a policy to have three months of reserves for which the organization is on track to meet. Additionally, although there was a credit line established in 2008, it has never been used and the organization carries no long-term debt.

Staff & Consultants

The organization operates largely by a fee-for-service model, with a notable increase in project revenue that directly affects expenses. The greatest expense increase between 2013 and 2016 came through the addition of staff to support project work. Staff and consultants grew from fewer than 10 in 2013 to more than 20 at times in 2015. Valley Vision has regularly used consultants and term-limited employees to rapidly scale the organization to meet project demands. This flexible model will continue so the organization can best respond to community demands in a timely fashion. Despite the increase in staff and consultant levels, the proportion of total expenses directed to staff salaries/benefits and consultant fees hovered around 75%.
**Income Sources**

Much of Valley Vision's revenue is derived from contracts and fee-for-service work. The revenue growth over the past three years stemmed predominantly from an increase in the number and size of projects. A larger proportion of Valley Vision's revenue (and expenses) was derived from events in 2015 than in past years as a result of the Region Rising event in November 2016. Valley Vision will produce this regional collaborative conference on a biannual basis moving forward with the next event scheduled for fall 2017.

Valley Vision receives most of its funding from private rather than public sources. In 2013, approximately 80% of Valley Vision's revenue came from private sources. That percentage dipped to about 66% in 2014, but returned to 80% in 2015. Maintaining diversity of funding sources has been, and will continue to be a priority for the organization.
Addendum A

Billable Rates. Valley Vision’s basis for project compensation is a billable rate. Valley Vision has calculated its billable rate schedule to account for staff wages and benefits, routine project expenses, agency administrative costs, and a margin that will allow for flexibility within the project as well as contribute to organizational reserves. Valley Vision’s research indicates that the billable rates are comparable with market rates and are re-assessed annually.

New Project Generation. Valley Vision secures new projects in one of two ways: (1) Valley Vision identifies an unmet community need, develops a strategy for addressing the issue, and solicits funders to support work. In seeking funding, Valley Vision approaches public sector entities, foundations, and private businesses with funding requests to afford all or portions of the project; (2) External organizations approach Valley Vision with identified needs and request Valley Vision’s support. In these instances, Valley Vision assesses the project concept against our organizational purpose and if it is determined to be an appropriate fit, works with the entity to mutually design a project plan. Whether Valley Vision is proactively initiating project concepts or responding to project concepts presented by others, a vast majority of projects emerge from prior work.

Project Planning + Costing. Valley Vision identifies the tasks that will be necessary to complete the project, how many hours those activities will require, the qualifications of staff needed to complete those activities, and other hard costs that will be incurred in project delivery. The results are used to establish project budgets and implementation schedules.

Project Implementation. Valley Vision installed Mavenlink, a project management software, in Spring of 2016 to improve overall project management capacities. This software has allowed project timelines, task progress, and staff hours to be tracked and projected much more precisely. Valley Vision has also sought to optimize its project implementation through its staffing patterns. Valley Vision uses permanent staff as well as temporary contractors to foster project implementation. This flexibility in staffing allows for rapid scaling and acquisition of expertise.

Self-sustaining Projects + Innovation. All the above aspects of the business model are being actively refined to move Valley Vision to an organization that is able to fully sustain all aspects of its operations through project revenue. Achieving complete sustainability through project revenue will allow revenue generated through Board donations and other general fundraising to be directed to the Innovation Fund and other discretionary purposes. This could include investment in existing projects to increase scale and/or impact. This goal will allow Valley Vision to further advance its independence as a research and leadership change organization.