

2013 ANNUAL REPORT

YOUR COMMUNITY. YOUR LEGACY.

# SONOMA VALLEY FUND

TAKING CARE OF BOTH.



*Strengthening Our Community Through  
Philanthropy and Legacy Giving*

COMMUNITY  
FOUNDATION  
SONOMA COUNTY



SONOMA VALLEY FUND

## To Our Friends

We are happy to report that 2013 was yet another successful year for Sonoma Valley Fund! So much happened in the past year—grants to organizations benefiting the Valley have soared, Community Foundation Sonoma County launched a much expanded scholarship program, and Sonoma Valley Fund continued to support the growth of legacy giving.

## Grant Making To Nonprofits Continues to Soar

Grant making from Sonoma Valley Fund, along with our parent organization, Community Foundation Sonoma County, increased once again in 2013. Just under \$417K was granted to non-profits serving Sonoma. This amount represents another record year for grant making—a slight increase over 2012 and a 200% increase over 2011! Since our inception in 2007, Community Foundation Sonoma County and Sonoma Valley Fund have directed a combined total of more than \$2.1M in grants to local nonprofits and scholarship recipients.

In 2013, our grants made to nonprofit organizations serving Sonoma Valley ranged in size and covered vastly significant areas for philanthropy. Recipients included community organizations dedicated to educational and environmental improvements, increased access to basic human services, and arts and culture.

The money behind these grants came from a variety of funds managed by Community Foundation Sonoma County. Almost \$300K was thanks to the generosity and foresight of Hazel and Roland Todd (see sidebar). Another \$115K was distributed to Sonoma Valley nonprofit organizations through Community Foundation Sonoma County's overall discretionary grant making processes (see sidebar).

At Sonoma Valley Fund, we are dedicated to sustaining and improving the quality of life in the Valley. It is gratifying to see that efforts to endow the Valley contribute significantly toward this worthy goal.

## Scholarship Programs Expand

Community Foundation Sonoma County launched a new and expanded scholarship initiative across the county in 2013. The expanded program more than doubled the number and amount of scholarship funds available for students. The impact of that expansion on the Valley was huge. Over \$145K was distributed from a variety of funds to college-bound students who live in our community.



2013 Star Volunteer Awards

## Nonprofit Partnerships Deepen

Sonoma Valley Fund brings nonprofit organizations together around the common goal of long-term financial health. We help them develop endowment and legacy giving programs that keep them resilient in ever-changing economic times and provide access to professional advisors. If they invest through Community Foundation Sonoma County, organizations also gain effective fund management and expert fulfillment of many fiduciary requirements. Sonoma Valley Fund partners with twenty two non-profit organizations, whose assets at Community Foundation Sonoma County now exceed \$2.5M.

This year, as a part of efforts to support our nonprofit partners, Sonoma Valley Fund sponsored a lecture on "How to Think About Collectibles". A representative of Bonham's Auction House in San Francisco provided useful perspectives on a range of treasures owned and cared for by Sonoma Valley residents. This was the first in a series of lectures that will cover a variety of topics on wealth management and philanthropy.

## Legacy Gift Promises

In 2013, Sonoma Valley Fund continued to support the growth of legacy giving in the Valley through education and events recognizing the value of philanthropy.

Community Foundation Sonoma County staff is able to work one-on-one with donors assisting them in directing charitable contributions to their favorite organizations, to donate now or in the future, within Sonoma Valley or beyond. To recognize those that make important gift promises to our community we inaugurated the Sonoma Valley Legacy Circle in 2011, which currently has 37 donor individuals and families. This past year, Sonoma Valley Fund hosted the second Sonoma Valley Legacy Circle Reception. Approximately 100 donors and nonprofit staff were honored at the event.

## The Future

Sonoma Valley Fund is still young but our mission remains clear — to promote and facilitate local philanthropy and legacy giving by serving as a bridge between nonprofits, estate-planning professionals, and donors. To ensure that our organization continues to make progress toward our mission, our board embarked on a strategic planning process in the fourth quarter of 2013. This process brought to light that the needs of the community are far-reaching and that we need to focus and effectively support the growth and development of philanthropy in the Valley to meet those needs. As always, we shall keep you well informed and engaged as we learn and develop new strategies to achieve our mission in the years to come.



*We remember Lois Gordon who passed away in 2013. She was an Advisor and friend to Sonoma Valley Fund.*



To our donors and supporters,— for all that you have done on behalf of Sonoma Valley Fund and our community — we thank you. We invite you to continue working with us to secure a bright future for the community in which we live.

Sincerely,  
**JOSHUA M RYMER**  
*Sonoma Valley Fund Board  
President, 2014-2015*

*“Sonoma Valley Fund was founded to help grow the philanthropic traditions in our community and to preserve the high quality of life we all appreciate. Our work is just beginning.”*

### SONOMA VALLEY FUND NONPROFIT PARTNERS

The following 22 nonprofit organizations have partnered with Sonoma Valley Fund to help strengthen their long-term financial health and to support one another:

Becoming Independent  
Boys & Girls Clubs of Sonoma Valley  
Friends in Sonoma Helping (FISH)  
Friends of Sonoma Valley Library  
Gary and Marcia Nelson Emergency Care Fund  
Hanna Boys Center  
La Luz Center  
Pets Lifeline  
Quarryhill Botanical Garden  
Seeds of Learning  
Sonoma Community Center

Sonoma Ecology Center  
Sonoma League for Historic Preservation  
Sonoma Valley Community Health Center  
Sonoma Valley Education Foundation  
Sonoma Valley Hospital Foundation  
Sonoma Valley Mentoring Alliance  
Sonoma Valley Museum of Art  
Sonoma Valley Teen Services  
Sweetwater Spectrum  
Vintage House  
WillMar Family Grief & Healing Center

# 2013 Star Volunteer Awards

More than 200 guests attended Sonoma Valley Fund's sixth annual Star Volunteer Awards at the new Sonoma Valley Hospital Emergency Department and Surgical Center to recognize 25 individuals for their community service. Our nonprofit partners selected the recipients.



*Join*  
THE  
SONOMA VALLEY  
LEGACY CIRCLE

Now anyone who establishes a legacy gift to Sonoma Valley Fund or to one or more of our nonprofit partners qualifies for membership in the Sonoma Valley Legacy Circle. To join, contact any of our board members or staff at Community Foundation Sonoma County to establish a Gift Agreement. Becoming a Legacy Circle Member demonstrates your pride and faith in the community and your commitment to ensuring that what you love about your hometown will continue for your heirs and future generations.

Call Us Today 707-579-4073

Or find us online at [www.sonomacf.org](http://www.sonomacf.org)



Hazel and Roland Todd

## Thanks to the Generosity of Roland and Hazel Todd

Hazel and Roland Todd named Community Foundation Sonoma County as the beneficiary of their \$8.5M bequest with the intent to focus the proceeds primarily in Sonoma Valley. In turn, Sonoma Valley Fund/Community Foundation Sonoma County have made a series of grants in 2013 of just over \$290K that will benefit local non-profits. The Todds entrusted Community Foundation with the stewardship of their legacy, to improve the quality of life and well-being of those who live in Sonoma Valley and Sonoma County.

This year's recipients included:

**LA LUZ BILINGUAL CENTER** — to continue English language instruction to more than 120 residents of Sonoma Valley for the 2013-2014 term and to build organizational capacity to ensure sustainability and growth of the ESL program. This program, which replaces one formerly operated by the Sonoma Valley Adult School, will also provide the tools to develop students' active participation in shaping the economic, social, and cultural aspects of Valley communities.

**UNITED WAY AND SCHOOLS OF HOPE** — to expand the number of students served through the Schools of Hope Literacy Initiative in Sonoma Valley. The goal of the Schools of Hope is to increase reading proficiency rates and ultimately high school graduation rates.

**SONOMA EDUCATION FOUNDATION** — to support its Summer Reading Academy, which was aimed at increasing third graders' reading engagement and motivation.

**SONOMA VALLEY COMMUNITY HEALTH CENTER** — to allow the Health Center to fund a new community outreach representative to educate community residents about health issues, build rapport between Springs residents and the Health Center, and assist residents in accessing a wide range of services across the Valley.

**SONOMA VALLEY COMMUNITY HEALTH CENTER** — to supply critical funding that helped the Health Center close escrow on its new facility.

**REDWOOD EMPIRE FOOD BANK** — to increase the availability of fresh food for low income people in crisis.

**NORTH BAY ORGANIZING PROJECT** — to enable residents of the Springs to attend the Ntosocke Leadership Training program.

## 2013 Community Foundation Sonoma County Grants to Sonoma Valley

Each year Community Foundation Sonoma County makes grants from a variety of funds to nonprofit organizations serving Sonoma Valley. 2013 grants from the Foundation included:

**PETS LIFELINE** — to improve the health of household pets in Sonoma Valley through the support of the Bilingual Wellness and Spay/Neuter Clinics.

**SONOMA VALLEY MUSEUM OF ART** — to bring public attention to Sonoma County artists and to increase public awareness of the value of the arts in Sonoma County.

**SONOMA ECOLOGY CENTER** — to support the organization's leadership in achieving the goals of the North Bay Climate Adaptation Initiative.

**AUDUBAN CANYON RANCH** — to fully launch Youth Environment Sonoma (YES), a standards-based service-learning project.

**FRIENDS IN SONOMA HELPING** — to support the emergency rental assistance program.

## SONOMA VALLEY LEGACY CIRCLE MEMBERS

Beth and Joe Aaron  
Diana and Steve Barclay  
Margaret Beeler and Thomas von Tersch  
Judith Bjorndal and Ron Wallachy  
Ellen and Drew Bradley  
Libby and John Brady  
Blythe and Robert Carver  
Zanne Clark  
Dennis and Mollie Collins  
Harriet and Randy Derwingson  
Theodore L. and Pat Eliot  
Jeanette and Whitney Evans  
Gemma Gallovich and Theodore Cutler  
Lois Gordon  
Donna and Jim Halow  
Susan and Jan Hoeffel  
Barbara Hughes and Greg DiPaolo  
Antoinette Kuhry and Tom Haeuser  
Margaret and Stephen Kyle  
Jim Lamb  
Marcia and Jim Levy  
Dottie and Bill Lynch  
Joyce E. Miller  
Hope and Jack Nisson  
Joyce and Steven Pease  
Valerie Pistole and Jeffrey Walter  
Martha and Stephen Rosenblatt  
Joshua Rymer and Timothy Frazer  
Cathie and Hank Sandbach  
Susanne and Victor Sangiacomo  
Scott Smith and Marcelo De Freitas  
Vicki and Dave Stollmeyer  
Barbara White Perry and Fred Perry  
Barbara Young  
Anonymous (3)

## SONOMA VALLEY FUND 2013 DONORS

Beth and Joe Aaron  
Simon and Kimberly Blattner  
Sara Boyette  
Libby and John Brady  
Suzanne Brangham and Jack Lundgren  
Dennis and Mollie Collins  
Karen Collins  
Harriet and Randy Derwingson  
Theodore L. and Pat Eliot  
Fleishhacker Foundation  
*(in memory of Lois Gordon)*  
Joe and Robyn Gibbs  
Thomas A. Haeuser and Antoinette Kuhry  
Susan and Jan Hoeffel  
Barbara Hughes and Greg DiPaolo  
Dottie and Bill Lynch  
Manuel Merjil  
Steven L. and Joyce Pease  
Joshua Rymer & Timothy Frazer  
Cathie and Hank Sandbach

## SONOMA VALLEY FUND BOARD 2013

Barbara Young, President  
Joshua Rymer, Vice-President  
Tom Haeuser, Secretary & Treasurer  
Harriet Derwingson, Past-President  
Whitney Evans, President Emeritus  
Joe Aaron  
Karen Collins  
Dennis Collins  
Susan Hoeffel  
Manuel Merjil  
Steven Pease  
Dave Pier  
*(Non-Profit Executive Director Member)*  
Martha Rosenblatt  
Scott Smith

## SONOMA VALLEY FUND ADVISORS 2013

Simon Blattner  
John Brady  
Suzanne Brangham  
Louann Carlomagno  
Susan Cook  
Arleen Curry  
Theodore Cutler  
Christine Dohrmann  
Richard Drew  
Theodore Eliot, Jr.  
Robert Erskine  
Maggie Salenger-Haywood  
Steve Kyle  
Jim Lamb

John Leland  
Marcia Levy  
Gary D. Nelson  
Jon Parker  
George Rathman  
Hank Sandbach  
Dave Stollmeyer  
John Story  
Jeffrey Walter  
Rick Wynne

## SONOMA VALLEY FUND GRANTS COMMITTEES 2013

Harriet Derwingson, Chair  
Loretta Carr  
Alejandra Cervantes  
Dianne Edwards  
Ted Eliot  
Camarino Hawing  
Maite Iturri  
Manuel Merjil  
George Rathman  
Dave Stollmeyer  
Barbara Hughes  
Robert Judd (CFSC Staff)

## COMMUNITY FOUNDATION SONOMA COUNTY STAFF

Elizabeth Brown,  
President and CEO  
J Mullineaux,  
Vice President for Philanthropic Planning

*We'd like to thank internationally known,  
Glen Ellen artist, Dennis Zieminski for generously  
allowing Sonoma Valley Fund to use 'Eucalyptus  
and Barn' on the cover of this year's annual report.*

FUND BALANCES AS OF DECEMBER 31, 2013 <i>(unaudited)</i>	
Sonoma Valley Affiliate Funds	\$110,600
Sonoma Valley Donor-Advised Funds	\$376,600
Nonprofit Partner Funds	\$2,532,300
<b>TOTAL FUNDS</b>	<b>\$3,019,500</b>

Revocable Promises to Give *(estimated, not included above)*: **\$8,050,000**

COMMUNITY  
FOUNDATION  
SONOMA COUNTY



SONOMA VALLEY FUND

*An affiliate of Community  
Foundation Sonoma County*

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