

2012 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 2012 was Sonoma Valley Fund's most successful year ever! The Fund's sponsorship of Endow Sonoma Valley Month, our partnerships with Valley non-profits, our grantmaking (along with parent, Community Foundation Sonoma County) to organizations benefiting the Valley, and our support of legacy giving were all at record levels this year.



Endow Sonoma Valley Month... A Great Success

In October of 2012 Sonoma Valley Fund launched the first ever Endow Sonoma Valley Month. The goals of this month-long series of events were to increase awareness of legacy giving in the Valley and to encourage more people to make a charitable legacy gift commitment. We succeeded on both counts. As a part of Endow Sonoma Valley Month, Sonoma Valley Fund sponsored six events aimed at increasing awareness, education and action. Some events were open to the general public, others targeted capacity building of our non-profit partners, and still others were directed at fostering awareness amongst influential donors. More than 500 people attended these events and the number of legacy donors doubled over the year. We are extremely pleased with the results of this effort and hope to continue to build on the concept in the years to come.

Gary and Marcia Nelson served as official ambassadors for Endow Sonoma Valley Month. We are very grateful to them for their generosity and dedication to the community.

Grantmaking Increases Dramatically

Grantmaking from Sonoma Valley Fund, and its parent Community Foundation Sonoma County, into the Valley increased dramatically in 2012. Over \$414,000 was granted to non-profits serving Sonoma Valley. This amount represents the single largest year for grantmaking to Sonoma Valley in our history – a 200 percent increase over 2011! Since Sonoma Valley Fund's inception in 2007, Community Foundation Sonoma County and Sonoma Valley Fund have directed a combined total of more than \$1.65M in grants to the Valley.

Our grants to non-profit organizations serving Sonoma Valley during 2012 came in all sizes, from \$1,000 to \$100,000. Recipients included community organizations dedicated to educational and environmental improvements in the Valley; increased access to basic human services; and arts and culture. Among the largest grants were \$71,000 to La Luz Bilingual Center's "English as a Second Language" (ESL) classes following the closure last year of the School District's ESL program; \$35,000 to the Sonoma Ecology Center to help create a community garden in Larson Park; \$42,300 to the United Way of the Wine Country to help Sonoma Valley third grade students meet reading standards through the Schools of Hope program; and \$40,000 to Pets Lifeline's Wellness and Spay/Neuter Clinics in the Valley.

The money behind these grants derives from a variety of funds managed by Community Foundation Sonoma County, Sonoma Valley Fund's parent organization. Almost \$300,000 represented initial grants from the Todd Trust, an \$8.5 million bequest from Roland and Hazel Todd left to benefit non-profit organizations primarily in Sonoma Valley (*see back panel*). Another \$120,000 was distributed to Sonoma Valley non-profit organizations based on Community Foundation Sonoma County's overall discretionary grantmaking processes. Some \$29,000 represented final grants from the Ellman Fund, a gift from Phyllis and George Ellman awarded over five years and targeted at Valley non-profits (*see back panel*).

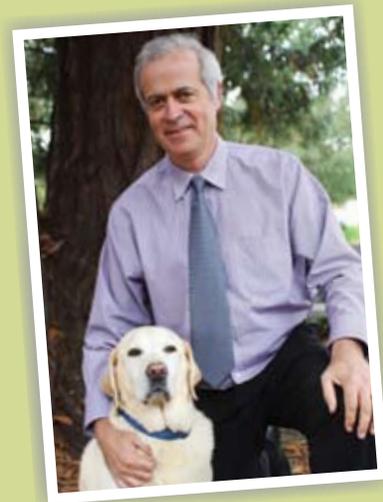
At Sonoma Valley Fund, we are dedicated to helping sustain and improve the overall quality of life in the Valley. It is gratifying to see that our efforts to endow the Valley have begun to contribute significantly toward this worthy goal.



Non-Profit Partnerships Continue to Grow

Sonoma Valley Fund brings area non-profit 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 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. Our non-profit partnerships now number a record 22, and their managed investments now exceed \$2.3 million.

This year, as a part of the Endow Sonoma Valley Month activities, special attention was given to supporting our non-profit partners as they seek to grow their legacy giving programs. In addition to working with Valley non-profits to include their donors and prospective donors in all of our celebrations and activities, Sonoma Valley Fund sponsored a workshop for all Valley non-profits, providing information and tools designed to help grow legacy-giving programs. The workshop featured Tom Horton, Director of Legacy Giving at Guide Dogs for the Blind, an international philanthropic organization with one of the most successful legacy giving programs in the country.



Tom Horton, Director of Legacy Giving at Guide Dogs for the Blind, was the guest speaker at our first ever Legacy Giving Workshop. Guide Dogs for the Blind has one of the most successful legacy giving programs in the country. Tom addressed approximately 60 representatives from Valley non-profits and provided practical advice and tips for developing legacy-giving programs.

Legacy Gifts Increase by 95%

In 2012, Sonoma Valley Fund set a goal of dramatically increasing the number of known legacy gift commitments to non-profits in the Valley. Working alongside our non-profit partners, we saw an increase of 95% in the number of known charitable legacy commitments to Valley non-profits.

At Sonoma Valley Fund we focused both on increasing our own legacy donor roster, which more than doubled to almost 40 known gift commitments, and on supporting our non-profit partners to expand their own legacy giving programs. Several of our non-profit partners made significant strides this year toward growing their legacy donor base. In fact, one non-profit organization increased the number of legacy donors to their organization from less than 10 to almost 40, a four-fold increase!

Sonoma Valley Fund can work with donors to enable them to direct their charitable contributions to their favorite organizations, to donate now or later, within Sonoma Valley or beyond. In 2011, we inaugurated the Sonoma Valley Legacy Circle to recognize those who choose to support the community through their estate plans. In June 2012, Sonoma Valley Fund hosted the first ever Sonoma Valley Legacy Circle Reception. Over 100 donors and non-profit staff were honored at the event. We look forward to hosting the 2nd Annual Sonoma Valley Legacy Circle Reception in 2013.

Sonoma Valley Fund is still young and our mission is clear: to promote and facilitate local philanthropy and legacy giving by serving as a bridge between nonprofits, estate-planning professionals and donors. No other organization unites all constituencies around the purpose of endowing the Sonoma Valley community as a whole. Thanks to the passionate commitment and tireless work of our volunteer board members, advisors, and committees, our accomplishments belie our age.

The results in 2012 represent only the beginning of our efforts to help sustain and improve the valley's unique socioeconomic, environmental, and cultural qualities for generations to come. We especially thank our donors and supporters, and we invite you, if you haven't already, to join us in working to secure a bright future for the community we love.



Sincerely,

A handwritten signature in black ink that reads "Barbara Young".

BARBARA YOUNG

Sonoma Valley Fund Board President, 2012-2013

Use of image on the cover "Hills Above the Vines" generously donated by internationally known, Glen Ellen artist, Dennis Ziemienski

“At Sonoma Valley Fund, we are dedicated to helping sustain and improve the overall quality of life in the Valley. It is gratifying to see that our efforts to endow the Valley have begun to contribute significantly toward this worthy goal.”

— BARBARA YOUNG, *Sonoma Valley Fund President*



More than 200 guests attended Sonoma Valley Fund's fourth annual Star Volunteer Awards at Hanna Boys Center to recognize 23 individuals for their community service. Our non-profit partners selected the recipients. Gary and Marcia Nelson, along with Rabobank, underwrote the celebration.

SONOMA VALLEY FUND NON-PROFIT PARTNERS

The following 22 nonprofit organizations have affiliated 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

“The Sonoma Valley Fund is working successfully to inspire each of us to think about, and work toward, growing legacy giving in our organizations. I am grateful for the work of SVF, and especially for the Endow Sonoma Valley Month that increased local awareness of the importance of thoughtful estate planning.”

— DAVID PIER

Chief Executive, Boys & Girls Clubs of Sonoma Valley

Join THE SONOMA VALLEY LEGACY CIRCLE

Now anyone who establishes a legacy gift to Sonoma Valley Fund or to one or more of our non-profit partners qualifies for membership in the new **Sonoma Valley Legacy Circle**.

To join, just let us know when you're on board. Becoming a 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

2012 Todd Trust Grants

Hazel and Roland Todd named Community Foundation Sonoma County as the beneficiary of their \$8.5 million Todd Trust, which focuses primarily on Sonoma Valley. Sonoma Valley Fund, in conjunction with parent organization Community Foundation Sonoma County, made a series of grants from the Roland and Hazel Todd Trust of just under \$300,000 that will benefit Sonoma Valley. The Todds entrusted the Community Foundation to steward their legacy, to improve the quality of life and well-being of those who live in Sonoma Valley and Sonoma County more generally. A team comprised of board members from Sonoma Valley Fund and Community Foundation Sonoma County and other community leaders completed its consideration of a series of short-term grants intended to respond to immediate needs in the Sonoma Valley.



Hazel and Roland Todd

ST. JOSEPH HEALTH SYSTEM — support the continued provision of dental services to low income residents in the Springs area

LA LUZ BILINGUAL CENTER (2 GRANTS) — ensure continuation of ESL classes and provide emergency rental assistance for low income Sonoma Valley residents in crisis

UNITED WAY AND SCHOOLS OF HOPE — support the implementation of a tutoring model to ensure third grade literacy competence in the Valley

SONOMA ECOLOGY CENTER — create a community garden for Springs' residents at Larson Park in Agua Caliente

SONOMA VALLEY EDUCATION FOUNDATION (2 GRANTS) — support the 2012 Youth Initiative and pilot a third grade Summer Reading Academy at El Verano School

2012 Ellman Fund Grants

2012 represented the fifth and final year of the Ellman grants. The original grant of \$150,000 from Phyllis and George Ellman has benefited several important environmental and historical preservation projects in the Valley. The grants in 2012 totaled \$29,000, and were awarded to five Sonoma Valley non-profit organizations in support of projects fostering environmental awareness and specific environmental improvements.



Phyllis and George Ellman

BOUVERIE PRESERVE, AUDUBON CANYON RANCH — improve and maintain the ten miles of trails on the property

SONOMA LAND TRUST — connect the Loop Trail at Glen Oaks Ranch to the new benches, maintain and improve both the Upper Loop Trail and the George and Phyllis Ellman trails

LANDPATHS — continued support for Flowery Elementary School's "In Our Own Backyard" program of field-based environmental activities and grassland restoration projects for third-graders

QUARRYHILL BOTANICAL GARDEN — support for the outdoor youth curriculum

SONOMA ECOLOGY CENTER — continued support for the K-12 Watershed Education Program, which provides hands-on bilingual science and outdoor experiences to 1,200 students annually

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
Harriet and Randy Derwingson
Pat and Ted 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 2012 DONORS

Bank of America Foundation
Drew and Ellen Bradley
Community Foundation Sonoma County
Harriet and Randy Derwingson
Christine Dohrmann
Pat and Ted Eliot
Jeanette and Whitney Evans
Gemma Gallovich and Theodore Cutler
Robyn and Joe Gibbs
Susan and Jan Hoeffel
Antoinette Kuhry and Tom Haeuser
John and Sandra Leland Foundation
Manuel Merjil
Marcia and Gary Nelson
JaMel and Tom Perkins
Rabobank
Karen and George Rathman
Martha and Stephen Rosenblatt
Joshua Rymer and Tim Frazer
Maggie Salenger-Haywood and
Peter Haywood
Cathie and Hank Sandbach
Susanne and Victor Sangiacomo
Pam and John Story
Barbara Young

SONOMA VALLEY FUND BOARD 2012

Barbara Young, President
Joshua Rymer, Vice-President
Tom Haeuser, Secretary & Treasurer
Harriet Derwingson, Past-President
Whitney Evans, President Emeritus
Joe Aaron
Peggy Bair
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 2012

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John Brady
Suzanne Brangham
Louann Carlomagno
Susan Cook
Arleen Curry
Theodore Cutler
Christine Dohrmann
Richard Drew
Ted Eliot
Robert Erskine
Maggie Salenger-Haywood
Steve Kyle
Jim Lamb
John Leland
Marcia Levy
Gary D. Nelson
Steve Page

Jon Parker
George Rathman
Hank Sandbach
Dave Stollmeyer
John Story
Jeffrey Walter
Rick Wynne

SONOMA VALLEY FUND GRANT COMMITTEES 2012

Ellman Fund 2012
Maggie Salenger-Haywood, Chair
Judith Bjorndal
Karen Collins
Susan Cook
Ethel Daly
Steve Kyle
Steven Pease

TODD TRUST COMMITTEE 2012

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)
Celia Bolam (CFSC Staff)

COMMUNITY FOUNDATION
SONOMA COUNTY
Elizabeth Brown,
President and CEO

FUND BALANCES AS OF DECEMBER 31, 2012 *(unaudited)*

Sonoma Valley Affiliate Funds	\$105,900
Sonoma Valley Donor-Advised Funds	\$307,900
Nonprofit Partner Funds	\$2,308,700
TOTAL FUNDS	\$2,722,500

Revocable Promises to Give *(estimated, not included above)*:
\$7,900,000



SONOMA VALLEY FUND

*An affiliate of Community
Foundation Sonoma County*

SONOMA VALLEY FUND
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