

Your Community. Your Legacy.

SONOMA VALLEY FUND

Taking Care of Both.

2014 ANNUAL REPORT

Strengthening Our Community Through
Philanthropy and Legacy Giving

COMMUNITY
FOUNDATION
SONOMA COUNTY 
SONOMA VALLEY FUND

2014

Dear Friends,

As Sonoma Valley Fund completes its eighth year of operation, I am pleased to report that the organization is playing an ever larger role in the future of our Valley. We have continued to support a stronger Sonoma Valley by:

- **Ongoing efforts to encourage more people in the Valley to consider including Sonoma Valley Fund in their estate plans and wills;**
- **Bringing our community together to discuss important issues;**
- **Being excellent stewards by relentlessly adhering to our donors' intentions; and**
- **Making grants to nonprofits and providing scholarships to collegebound students.**

In 2014, Sonoma Valley Fund partnered with La Luz Center on an important Community Forum – A Portrait of Sonoma County. The Forum brought together more than 125 residents to learn more about an important study sponsored by the County Department of Health Services. We anticipate sponsoring more forums and conversations like this in 2015 and beyond.

This is the second year in a row that total grants and scholarships from the Fund have exceeded a half million dollars. Sonoma Valley Fund partnered with our parent organization, Community Foundation Sonoma County, to provide over \$350K in grants to nonprofits in the Valley and another \$169K in scholarships to students within our community. The staff at Community Foundation, working with the Sonoma Valley Fund Grants Committee, has identified impactful, underfunded grant opportunities that reflect the desires of the donors and that will have a large impact on our community.

Lastly, and most importantly, we thank YOU for your volunteered time, financial support, and everlasting love for your community. Let's continue working together to ensure the future of Sonoma Valley remains full of promise for all who call it home.



Sincerely,

A handwritten signature in black ink, appearing to read 'Joshua M Rymer', written in a cursive style.

Joshua M Rymer
Sonoma Valley Fund Board President, 2014-2015

SONOMA VALLEY FUND STRATEGY



SONOMA VALLEY FUND BOARD 2014

Joshua Rymer, *President*

Dennis Collins, *Vice President*

Barbara Hughes, *Secretary & Treasurer*

Harriet Derwingson, *Past President*

Whitney Evans, *President Emeritus*

Kimberly Blattner

Mandy Bolling

Suzanne Brangham

Richard Dale (*NonProfit Executive
Director Member*)

Bill Lynch

Penney Magranne

Valerie Pistole

Scott Smith

Barbara Young, *Past President*

Elizabeth Brown, *President and CEO CFSC*

Miguel Ruelas, *CFSC Staff*

INCREASE GRANT MAKING

In the last three years Community Foundation Sonoma County and Sonoma Valley Fund have gifted almost \$1.5M in grants and scholarship awards to Sonoma Valley recipients!

In 2014 alone, the Foundation and Fund awarded more than \$520K, including grants to 32 organizations, all thanks to the generosity of our donors. Some of this year's grant highlights include:

Sonoma Valley Community Health Center — \$100K was provided to support their transition from a Traditional Behavioral Health model to an Integrated Behavioral Health model, allowing for more clients to be served annually.

La Luz Bilingual Center — \$72K was granted to continue English language instruction to residents of Sonoma Valley for 2014-2015

and to build organizational capacity to ensure sustainability and growth of the ESL program in the future.

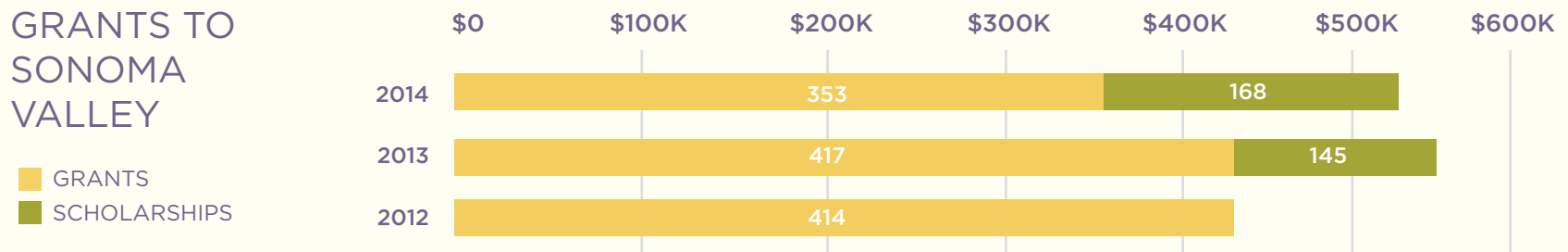
Sonoma Ecology Center — \$29.5K was granted to support their leadership in participation in the North Bay Climate Adaptation Initiative .

Sonoma Valley Museum of Art — \$15K was provided to support the Arts Rewards the Students program, providing 4th and 5th grades studio art instruction and professional development to art instructors.

Audubon Canyon Ranch — \$15K was granted to support the Youth Environment Sonoma (YES) program, a standards based service learning project.

Since inception in 2007, Sonoma Valley Fund, and parent Community Foundation Sonoma County, have distributed almost **\$2.8 million in grants to nonprofits in the valley** on behalf of our generous donors.

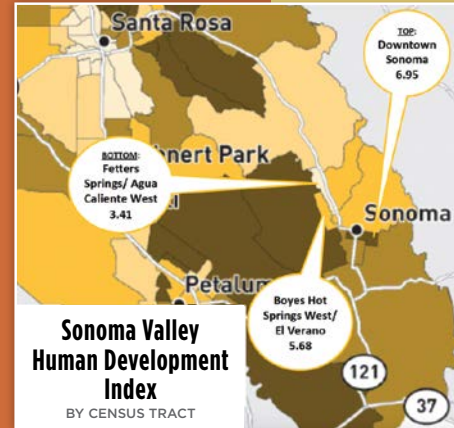
GRANTS TO SONOMA VALLEY



BECOME A CATALYST FOR A STRONGER COMMUNITY

On an early evening in September, more than 125 Valley residents crowded into the Grange to participate in a Community Forum entitled “A Portrait of Sonoma Valley” sponsored by Sonoma Valley Fund and La Luz Center. In a specially crafted presentation, representatives from the County’s Health Department illustrated the significant inequity that exists within our community’s earnings, health and education sectors. A panel discussion followed, moderated by CEO of Community Foundation Sonoma County, Beth Brown, along with Louann Carlomagno (Sonoma Valley Unified School District: Superintendent of Schools), Maite Iturri (El Verano Principal) and Juan Hernandez (Executive Director at La Luz Center).

The Portrait of Sonoma County inspired us to continue to raise awareness of critical issues facing the community. We are committed to sponsoring and facilitating more discussions like these in the coming years. Specifically, we are hosting and organizing a series of community conversations, moderated by David Bolling (former Publisher/Editor of the Sonoma Index Tribune).



The “Portrait of Sonoma Valley” Human Development Index combines the fundamental indicators of education, health, and earning to create a single measure of well-being, expressed as a numerical score between 0 and 10. Of concern is the disparity evidenced between our different neighborhoods, on both the individual and aggregate measures.

INSPIRE AND ENGAGE DONORS

More than 250 donors and guests attended Sonoma Valley Fund's seventh annual Star Volunteer Awards at the new Sonoma Valley Community Health Center. Awards were presented to 25 individual volunteers in recognition of their service to our nonprofit partner organizations. The dedication and commitment of these volunteers inspired all of those present.



SONOMA VALLEY FUND NONPROFIT PARTNERS

The following 21 nonprofit organizations have partnered with Sonoma Valley Fund to help encourage our community to expand its commitment to legacy giving and to support more and better philanthropy:

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

BUILD A SIGNIFICANT ENDOWMENT



Suzanne Brangham

“Because of a capital event in 2014, it became apparent to me that setting up a Donor Advised Fund was extremely beneficial in continuing contributions to a variety of nonprofits in Sonoma Valley. Now, I give with greater ease and efficiency. There was also a large tax benefit in moving monies to a Donor Advised Fund within the same year. By having a local Donor Advised Fund I get good advice and guidance regarding the Valley nonprofits, their Executive Directors, needs, status, direction. Simply put, it feels good and works well.”

SUZANNE BRANGHAM, *Sonoma developer*

LEGACY CIRCLE

We gratefully acknowledge members of Sonoma Valley Fund’s Legacy Circle who have chosen us to be the stewards of their future planned gifts for the Valley.

Beth and Joe Aaron
Diana and Steve Barclay
Margaret Beeler and
Thomas von Tersch
Judith Bjorndal and Ron Wallachy
Kimberly Blattner
Ellen and Drew Bradley
Libby and John Brady
Linda Brekken and Tom Bakke
Karen and Leland Bushnell
Blythe and Robert Carver

Zanne Clark
Dennis and Mollie Collins
Harriet and Randy Derwingson
Pat and Ted Eliot
Jeanette and Whitney Evans
Gemma Gallovich and
Theodore Cutler
Donna Halow
Marie C. Hicklin
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
Jean Miller
Hope and Jack Nisson
Joyce and Steven Pease
Valerie Pistole and Jeffrey Walter
Martha and Stephen Rosenblatt

Joshua Rymer and Timothy Frazer
Catharine O. and Hank Sandbach
Susanne and Victor Sangiacomo
Scott Smith and Marcelo De Freitas
Vicki and Dave Stollmeyer
Barbara White Perry and Fred Perry
Phil and Connie Woodward
Barbara Young
Anonymous (3)

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.

THANK YOU

SONOMA VALLEY FUND 2014 DONORS

Kimberly and Simon Blattner
Suzanne Brangham and
Jack Lundgren
Dennis and Mollie Collins
Richard Dale
Harriet and Randy Derwingson
Christine Dohrmann
Gemma Gallovich and
Theodore J. Cutler
Thomas A. Haeuser and
Antoinette Kuhry
Barbara A. Hughes and
Gregory DiPaolo
Dottie and Bill Lynch
Penney Magranne and Joan Howley

Thomas Peterson
Valerie Pistole and Jeffrey A. Walter
George and Karen Rathman
Joshua Rymer and Timothy Frazer
Maggie Salenger-Haywood
and Peter Haywood
Catharine O. and Hank Sandbach
Scott T. Smith and Marcelo Defreitas
Mandy Weltman and David Bolling
Jeanette and Whitney Evans
Barbara Young

SONOMA VALLEY FUND ADVISORS 2014

Joe Aaron
Simon Blattner
John Brady

Louann Carlomagno
Karen Collins
Susan Cook
Arleen Curry
Theodore Cutler
Christine Dohrmann
Richard Drew
Theodore Eliot, Jr.
Robert Erskine
Thomas Haeuser
Jennifer Hainstock
Donna Halow
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Hank Sandbach
Dave Stollmeyer
John Story
Jeffrey Walter
Rick Wynne

COMMUNITY FOUNDATION SONOMA COUNTY STAFF

Elizabeth Brown, *President and CEO*
Miguel Ruelas, *Director of
Philanthropic Advising*

sonomavalleyfund.org

FUND BALANCES AS OF DECEMBER 31, 2014 *(unaudited)*

Sonoma Valley Affiliate Funds	\$123,558
Sonoma Valley Donor-Advised Funds	\$505,810
Nonprofit Partner Funds	\$2,498,286
TOTAL FUNDS	\$3,109,888

Revocable Promises to Give *(estimated, not included above)*: **\$8,800,000**

SONOMA VALLEY FUND

Box G
Sonoma, California 95476
707-579-4073

sonomavalleyfund.org
sonomacf.org



SONOMA VALLEY FUND

*An affiliate of
Community Foundation Sonoma County*