

SONOMA VALLEY FUND

Our Community Our Legacy

2015 ANNUAL REPORT

Strengthening Our Community
Through Philanthropy



2015



Dear Friends,

As Sonoma Valley Fund approaches its 10th year, I am pleased to report that our all-volunteer organization continues to strengthen our community by:

- **Helping donors achieve their philanthropic goals**
- **Bringing our community together to discuss important issues**
- **Being excellent stewards by relentlessly adhering to our donors' intentions**
- **Making thoughtful and targeted grants to nonprofits and providing scholarships to college-bound students**

In early 2015, Sonoma Valley Fund organized a community discussion and survey seeking to understand what residents thought about the future of our community. I was struck by the engagement of our neighbors; over 150 people came to the discussion and almost 400 filled out the survey. The issues identified were wide-ranging, from income inequality to threats to the natural environment. I'm inspired by the passion and enthusiasm that we have for our community and how much we all want to help shape and protect its future. This passion we feel for "our place," Sonoma Valley, is tremendous. We need to use that passion to make our Valley better.

This year we also launched an ambitious and exciting grants program aimed at strengthening Sonoma Valley nonprofits. The program is helping nonprofits develop the skills and resources needed to grow and become more effective. This is an innovative grant making program that addresses significant problems in the nonprofit community, and the lack of resources to build organizational capabilities.

I am very proud of the work being done here. Since our beginning in 2007, Sonoma Valley Fund, in conjunction with Community Foundation Sonoma County, has made grants and scholarships in excess of \$3 million to nonprofits and students in the Valley.

Finally, our partnership with Community Foundation Sonoma County is stronger than it has ever been. Our board routinely collaborates with Community Foundation staff on grantmaking, donor engagement, and support for nonprofits.

Sonoma Valley Fund has a great board and ambitious plans for the future. Peg Van Camp will join me as Co-President in 2016, ensuring strong and qualified leadership and continuity into the future. Peg brings many years of nonprofit and foundation experience to this role. The rest of our board is comprised of talented and committed people who share a love of our unique and wonderful community.

As always, we thank YOU for your love of our Valley, your financial support and the talents you bring to our community. Let's continue working together to ensure that 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". The signature is fluid and cursive, with a large loop at the end.

Joshua M Rymer

Sonoma Valley Fund Board President, 2014-2015

SONOMA VALLEY FUND STRATEGY



SONOMA VALLEY FUND BOARD 2015

Joshua Rymer, *President*

Kimberly Blattner, *Vice President*

Dennis Collins, *Secretary*

Barbara Hughes, *Treasurer*

Whitney Evans, *President Emeritus*

Mandy Bolling

Suzanne Brangham

Richard Dale, *Nonprofit Representative*

Ted Eliot

Katherine Fulton

Arthur Gandy

Maite Iturri

Penney Magrane

Valerie Pistole

Scott Smith

Peg Van Camp

Judy Young

Miguel Ruelas, *Director of Philanthropic Advising*

BECOME A CATALYST



Libby and John Brady have long had a passion for helping young, high performing students in Sonoma Valley get to and through college. They and a small group of co-investors have turned that passion into a renewable scholarship program. Over the last 12 years, that program has provided top scholars the chance to achieve their dreams of higher education. Their unique program literally pays for performance.

In 2015, John and Libby developed a Planned Gift Agreement with Sonoma Valley Fund at Community Foundation Sonoma County to continue their legacy into the future.

“We seek to encourage, assist and reward high academic performance by Valley students in college. We find the Sonoma Valley Fund board, made up of successful and locally focused people, to be the right choice for continuing our program of merit-based scholarships.”

– JOHN AND LIBBY BRADY

A STRONGER COMMUNITY

The Sonoma Valley Fund launched its “Community Conversations” in April of 2015 with “Shaping Sonoma Valley 2030: Confronting the Myth of Paradise,” a dialogue with publisher, editor and journalist David Bolling, and Oscar Chavez, assistant director of Human Services for the County of Sonoma. Katherine Fulton (*SVF Board Member*) moderated the evening.

Our aim was to acknowledge and address: growing economic and ethnic divides, a lack of affordable housing, strains on public education, the aging of our population, stresses on the natural environment and the struggle to maintain a strong community in the face of growing numbers of tourists and part-time residents. Our plan is to continue these conversations, and we hope to help catalyze the leadership needed to shape a vision and strategy for the collective future.



About 150 residents gathered in Andrews Hall to express their views about the future of Sonoma Valley

INSPIRE & ENGAGE DONORS

More than 250 donors and guests attended Sonoma Valley Fund's eighth annual Star Volunteer Awards at the Sonoma Ecology Center's Sonoma Garden Park. Awards were presented to 26 individual volunteers in recognition of their service to our nonprofit partner organizations. Their hard work and dedication inspire us!

Top row (left to right): *Moises Farias (Stephanie Stubbs' mentee), Stephanie Stubbs (Sonoma Mentoring Alliance), Issac Vargas (La Luz Center), Bill Myers (Sonoma Ecology Center), Corin Rasmussen (Sonoma Community Center)*

2nd row (left to right): *Thai Hoang (Hanna Boys Center), Eric Peterson (Vintage House), Meg Sokoloski (Sonoma Valley Education Foundation), Luis Rivera (Voit McKarre's mentee), Lulu Carlsson (Lisa Carlsson's daughter), Lisa Carlsson, Steve Corey (Quarryhill), Fred Cohen (Sweetwater Spectrum), Carolyn Klebanoff Cohen (Sweetwater Spectrum), Mark Etherington (Seeds of Learning), Eric Gullotta (Becoming Independent), Bill O'Neal (Vintage House)*

Front row (left to right): *Hilda Teran Franklin (Sonoma Valley Hospital Foundation), Linda Alwitt (FISH), Linda Pavlak (Sonoma Ecology Center), Ginny Richardson (Sonoma League of Historic Preservation), Jerica Tercero (Teen Services Sonoma), David Wells (Teen Services Sonoma), Gayle O'Hara (Pets Lifeline), Jesus AguayoZuniga (Sonoma Valley Community Health Center)*

Not pictured: *Stan Abercrombie (Sonoma Valley Museum of Art), Paul Viyera (Sonoma Valley Museum of Art), Voit McKarre (Mentoring Alliance), Marcie Waldron (Vintage House).*



Photo courtesy of Melania Mahoney Photography

SONOMA VALLEY FUND PARTNERS

The following 20 nonprofit organizations partner with Sonoma Valley Fund to encourage and expand legacy giving as well as more and better philanthropy:

Becoming Independent
Boys & Girls Clubs of Sonoma Valley
Friends in Sonoma Helping (FISH)
Friends of Sonoma Valley Library
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

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

Suzanne Brangham

Linda Brekken and Tom Bakke

Karen and Leland Bushnell

Kathryn and Richard Caggiano

Blythe and Robert Carver

Zanne Clark

Mollie and Dennis Collins

Harriet and Randy Derwingson

Pat and Ted Eliot

Jeanette and Whitney Evans

Gayle and Gerald Farr

Gemma Gallovich and

Theodore Cutler

Donna Halow

Marie C. Hicklin

Troy and Steven Hightower

Susan and Jan Hoeffel

Barbara Hughes and Greg DiPaolo

Antoinette Kuhry and Tom Haeuser

Holly 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

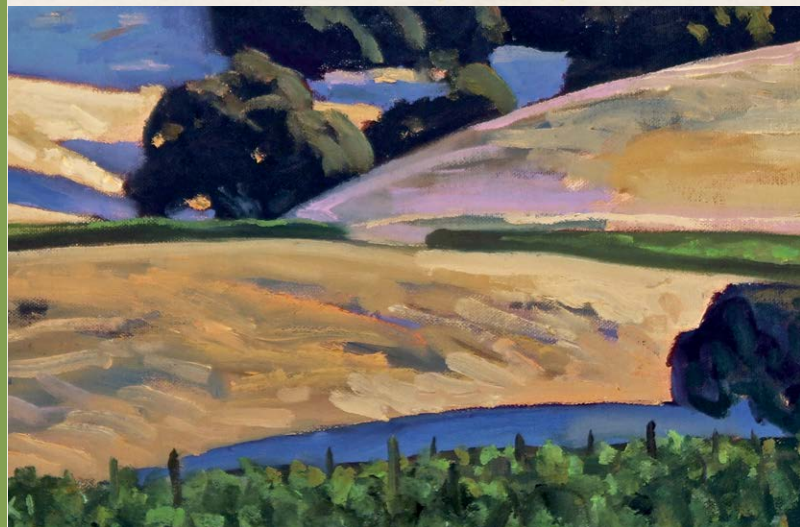
Connie and Phil Woodward

Barbara Young

Anonymous (3)

JOIN THE SONOMA VALLEY LEGACY CIRCLE

Anyone who establishes a legacy gift through Sonoma Valley Fund qualifies for membership in the *Sonoma Valley Legacy Circle*. Contact any of our Board members to establish a gift agreement. With your permission, we will recognize your planned gift promise in our annual report each year and occasionally invite you to participate in Legacy Circle events. Becoming a Legacy Circle Member demonstrates your pride and faith in the community and your commitment to ensuring that what you love about the valley will continue for your heirs and future generations.



INCREASE GRANT MAKING

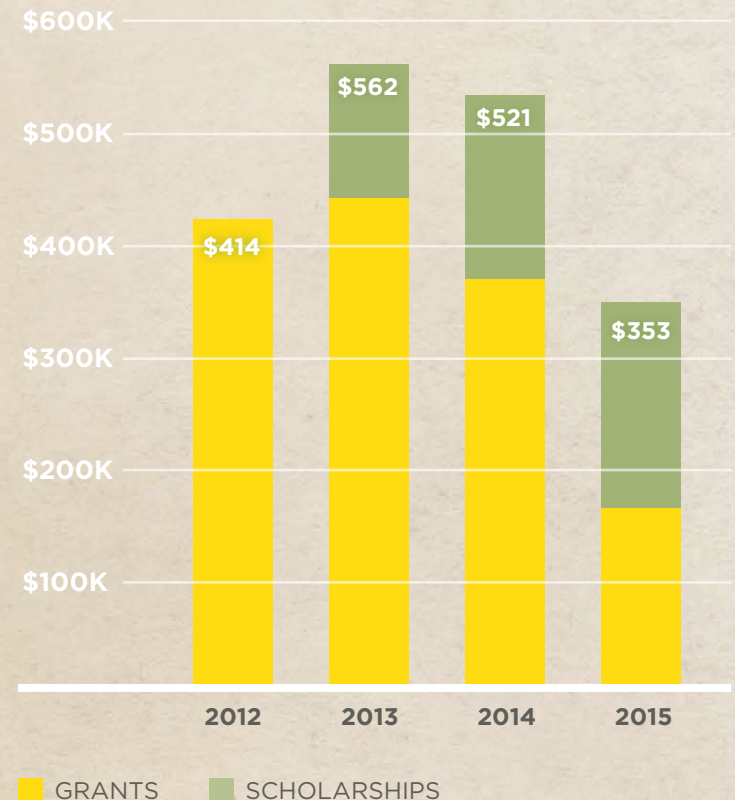
In the last four years, Community Foundation Sonoma County and Sonoma Valley Fund have given almost \$1.8 million in grants and scholarships to Sonoma Valley recipients. The amount granted in 2015 decreased, but only because the amount given in two new grant areas – for open space and capacity building are back-loaded. Meaning a disproportionate share of those grant monies will be given in coming years. More on the capacity building grants below.

In 2015, the Foundation and Fund awarded more than \$190K to 13 Sonoma Valley nonprofits plus 61 scholarship grants for a total of over \$350K. Since our inception in 2007, CFSC and SVF have awarded over \$3 million to Sonoma Valley nonprofits and students.

2015 Capacity Building Grants

Six Sonoma Valley nonprofit organizations were selected to participate in a multi-year program to increase their organizational capacities. Each nonprofit received a small grant and will work with organizational development consultants provided by CFSC to create a plan for increasing their: growth, efficiency and effectiveness. At the end of 2016, these nonprofits may then apply for additional grant monies to help them take the next steps. The six organizations are: ARTescape, Boys & Girls Clubs of Sonoma Valley, La Luz Center, Sonoma Overnight Support, Sonoma Valley Mentoring Alliance, and Teen Services Sonoma.

GRANTS TO SONOMA VALLEY



THANK YOU

SONOMA VALLEY FUND 2015 DONORS

Beth and Joseph Aaron
Kimberly and Simon Blattner
Mandy Bolling and David Bolling
Suzanne Brangham
Karen and Leland Bushnell
Mollie and Dennis Collins
Harriet and Randy Derwingson
Pat and Theodore L. Eliot
Jeanette and Whitney Evans
Katherine Fulton and Katharine Kunst
Gemma Gallovich and
Theodore J. Cutler
Margaret and Arthur Grandy
Donna Halow
Barbara A. Hughes and
Gregory DiPaolo
Antoinette Kuhry and
Thomas A. Haeuser

Marcia and Jim Levy
Penney Magrane and Joan Howley
Rosemary and Kevin McNeely
Joyce and Steven L. Pease
Valerie Pistole and Jeffrey A. Walter
Nancy Ramsey
Hope L. and David M. Hirsch Fund of
the Rhode Island Foundation
Joshua Rymer and Timothy Frazer
Maggie Salenger-Haywood and
Peter Haywood
Catharine O. and Henry A. Sandbach
Margaret E. Van Camp
Barbara Young
Judy A. Young

SONOMA VALLEY FUND ADVISORS 2015

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Simon Blattner

John Brady
Louann Carlomagno
Karen Collins
Susan Cook
Arleen Curry
Theodore Cutler
Harriet Derwingson
Christine Dohrmann
Richard Drew
Robert Erskine
Thomas Haeuser
Donna Halow
Maggie Salenger-Haywood
Susan Hoeffel
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Jim Lamb
John Leland
Marcia Levy
Steve Page

Steve Pease
Jon Parker
George Rathman
Martha Rosenblatt
Hank Sandbach
Dave Stollmeyer
John Story
Jeffrey Walter
Rick Wynne
Barbara Young

COMMUNITY FOUNDATION SONOMA COUNTY STAFF

Elizabeth Brown, *President and CEO*
Karin Demarest, *Vice President
for Programs*
Miguel Ruelas, *Director of
Philanthropic Advising*

FUND BALANCES AS OF DECEMBER 31, 2015 *(unaudited)*

Sonoma Valley Affiliate Funds	\$145,712
Sonoma Valley Donor-Advised Funds	\$422,149
Nonprofit Partner Funds	\$2,019,173
TOTAL FUNDS	\$2,587,034

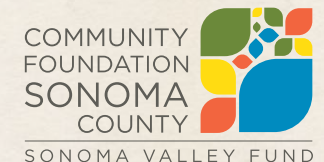
Revocable Promises to Give *(estimated, not included above)*: **\$12,254,000**

SONOMA VALLEY FUND

C/O Community Foundation
Sonoma County

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Santa Rosa, CA 95401
707-579-4073

sonomavalleyfund.org
sonomacf.org



*An affiliate of
Community Foundation Sonoma County*