




# SONOMA VALLEY FUND

Our Community Our Legacy

**2016**  
ANNUAL REPORT

Strengthening Our Community  
Through Philanthropy

COMMUNITY  
FOUNDATION  
SONOMA  
COUNTY



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SONOMA VALLEY FUND

# 2016



Dear Friends,

Sonoma Valley Fund is now in its 10th year! We celebrate and thank all of the Fund's founders – a dedicated group of Valley residents who had the vision, and who understood the need for championing philanthropy to strengthen our Sonoma Valley community.

Since its inception, Sonoma Valley Fund, with an all-volunteer advisory board, has been an affiliate of Community Foundation Sonoma County. As an affiliate, the board continues to assist the Foundation by promoting philanthropy - both current and legacy giving - in Sonoma Valley, acting as the Foundation's eyes and ears to help it understand and address the needs and challenges facing our community, and addressing those needs and challenges through grantmaking, convenings, thought leadership, and the dissemination of information helpful to donors, nonprofits, and the greater community.

Sonoma Valley Fund recognizes that donor/nonprofit collaboration is a significant driver of improvements for all Valley residents. The Fund works with donors, nonprofits and the Valley community in several ways. The Fund:

1. Hosts an annual “Star” celebration which serves as a venue for our partner nonprofits to both honor their volunteers and promote volunteerism in the community.
2. Champions the importance for donors of creating a legacy plan, and for nonprofits of establishing and maintaining a legacy program. We consult with individuals and families, advising them about community professional resources and the Foundation's services. We provide a model program to nonprofits that they can mold to their own needs, resources, timeline, and donor base.
3. Oversees important grantmaking in Sonoma Valley. The recent Sonoma Valley Fund multi-year capacity building cohort grant program is one example, highlighted further in this Annual Report.
4. Works with the Foundation as a Valley leader and convener. Donors are afforded opportunities to learn the value of philanthropy, nonprofits can apply for grants, and both, along with the larger community, periodically receive information about the social, cultural, and economic state of Sonoma Valley. These efforts help donors as they decide their giving priorities, and nonprofits as they review their goals and programs to successfully deliver on their missions.

While we herald the work the Fund has done in the last ten years, we are mindful of the challenges of the next ten. We believe current and long term philanthropy is a critical component of a successful, thriving community – a community that respects its diversity, values the talents of its citizens, and invites the participation of all. Please join us in this work.

Sincerely,

A handwritten signature in black ink that reads "Peg Van Camp".

Peg Van Camp

*Sonoma Valley Fund Board Co-President, 2016*

# SONOMA VALLEY FUND STRATEGY



## SONOMA VALLEY FUND BOARD 2016

Joshua Rymer, *Co-President*

Peg Van Camp, *Co-President*

Kimberly Blattner, *Secretary*

Barbara Hughes, *Treasurer*

Whitney Evans, *President Emeritus*

Mandy Bolling

Suzanne Brangham

Ted Eliot

Katherine Fulton

Arthur Grandy

Juan Hernandez, *Nonprofit Representative*

Penney Magrane

Valerie Pistole

Nancy Ramsey

Miguel Ruelas, *Director of Philanthropic Advising*

Lorna Sheridan

Scott Smith

Donald Van de Mark

Judy Young

# BECOME A CATALYST

**B**arry and Lorna Sheridan moved to Sonoma in 2006. It was their sixth move, criss-crossing the country, since getting married, thanks to Barry's job as marketing executive in the wine business.

They quickly fell in love with the Valley. "And now we never plan on leaving," says Barry. Lorna is a reporter for the Sonoma Index-Tribune as well as an SVF board member, and she's now well-versed in the good work being done by area nonprofits. Last year, the couple opened a donor advised fund with the Community Foundation Sonoma County so they have an easy way of supporting the organizations that make the Valley such an amazing place to live. Lorna's passion is education, Barry's is preserving open spaces.

*We had made donations through a Fidelity Charitable Trust account for many years," explained Lorna. "But the moment I heard that the Sonoma Valley Fund offered the same services, we moved our account over – thrilled to experience the same convenient way to give more locally."*



# INSPIRE & ENGAGE DONORS

**C**lose to three hundred donors and guests attended Sonoma Valley Fund's ninth annual Star Volunteer Awards at Cornerstone. Awards were presented to 22 volunteers who exemplify dedication to our nonprofit partner organizations. Many thanks to Ramekins for their refreshments and to Darius and Sarah Anderson for their hospitality at Cornerstone.

**Pictured, front row:** Windee Smith (Boys & Girls Clubs), Jan Erickson (Sweetwater Spectrum), Nancy King (Mentoring Alliance), Carol Morphy (Sonoma Valley Education Foundation), Patsy Wallace (Sonoma Valley Education Foundation), Julia Wilkinson (Quarryhill), Ina Welker (Quarryhill), Kymm Falls (Sonoma Valley Museum of Art), Jenah Smith (Teen Services Sonoma).

**Back row:** Supervisor Susan Gorin, Hank Martinson (Sonoma Community Center), Rosie Palacio (Mentoring Alliance), Tony Ghisla (Hanna Boys Center), David Morell (Sonoma Ecology Center), Philip Wilkinson (Quarryhill), Marc Schwager (Sonoma Valley Community Health Center), Jorge Antonio Guillermo Aquino (La Luz Center).

**Not pictured:** Jerri Sheehan (F.I.S.H.), Judy Black & Dale Miller (Pets Lifeline), Mike Turgeon (Seeds of Learning), Zanne Clark (Sonoma League for Historic Preservation), Rose Mary Schmidt (Sonoma Valley Hospital Foundation), Roland Gangloff (Mentoring Alliance), Phyllis Carter (Vintage House)



Photo courtesy of Melania Mahoney Photography

# CAPACITY BUILDING GRANTS-YEAR 2

Launched last year, the Sonoma Valley Fund multi-year capacity building grants program is an ambitious initiative helping six nonprofits explore and pursue the resources and skills needed to become more effective in delivering on their missions. Completing its first year of work together in October of 2016, this powerful learning cohort identified the following capacity building priorities: a collaborative data collection project between three organizations; a complete program delivery assessment; development of a data utilization plan; and professional development to build leadership capacity. The focus for year two is implementing these projects.

This successful grants program illustrates how a learning cohort of different-sized nonprofits has found that greater good is achievable through collaboration that takes a fresh look at: vision, mission, and goals, and gives each organization a chance to learn about the challenges and opportunities faced by fellow nonprofits. We are proud of this multi-year investment dedicated to improving organizational effectiveness and building lasting partnerships.



*Joshua Rymer, Ted Eliot, Barbara Hughes, Robert Hughes, Juan Hernandez, Thena Trygstad, Erin Riley Downing, Ellen Irie, Marcelo Defreitas, Jill Blair, Cristin Felson, Karin Demarest, Lee Morgan Brown, Lorraine Ashton, Kathy King, Peg Van Camp*

*The six valley organizations that will receive \$20,000 each this year are: **ArtEscape, Boys & Girls Clubs of Sonoma Valley, La Luz Center, Sonoma Overnight Support, Sonoma Valley Mentoring Alliance, and Teen Services Sonoma***

## 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 Joseph Aaron

Diana and Steve Barclay

Margaret Beeler and

Thomas von Tersch

Judith C. Bjorndal and

Ron Wallachy

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 Theodore L. Eliot

Jeanette and Whitney Evans

Gayle and Gerald Farr

Gemma Gallovich and

Theodore Cutler

Donna Halow

Marie C. Hicklin

Steven and Troy Hightower

Jan and Susie Hoeffel

Antoinette Kuhry and

Thomas A. 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 L. Pease

Barbara White Perry and

Fred Perry

Valerie Pistole and

Jeffrey A. Walter

Martha and Stephen Rosenblatt

Joshua Rymer and

Timothy Frazer

Catharine O. and

Henry A. Sandbach

Susanne and

Victor F. Sangiacomo

Scott T. Smith and

Marcelo Defreitas

Vicki and David Stollmeyer

Margaret Van Camp

Donald Van de Mark

Connie and Philip Woodward

Barbara Young

## 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.



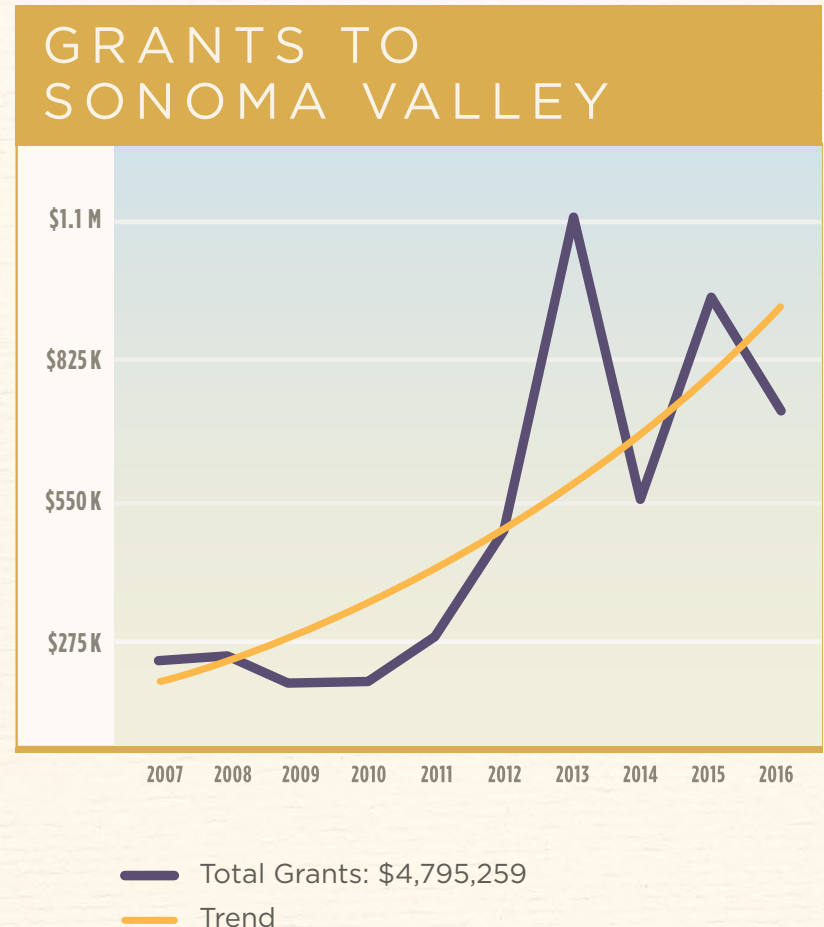
# INCREASE GRANTMAKING

Since the Fund's inception, Community Foundation Sonoma County and the Sonoma Valley Fund have awarded almost \$4.8 million in grants and scholarships in Sonoma Valley. The adjacent line chart illustrates a dramatic grant increase in the last 10-year period - a track record that makes us very proud. Grants reported in our line chart include those from donor advised, designated, discretionary and scholarship funds.

In 2016, the Foundation and Sonoma Valley Fund awarded over \$700,000 in grants and scholarships to Sonoma Valley recipients, over three times more than during the first five years of the Fund.

Time Period	Average Annual Investment
2007 to 2011	\$211,000
2012 to 2016	\$747,000

The creation of the Sonoma Valley Fund has heightened awareness in the community regarding charitable giving. And thanks to legacy gifts such as the Ellman Fund and the Hazel and Roland Todd Trust, we are now having a much stronger impact in our beloved valley.



# THANK YOU

## SONOMA VALLEY FUND 2016 DONORS

Kimberly & Simon Blattner  
Mandy & David Bolling  
Libby & John Brady  
Suzanne Brangham  
Harriet & Randy Derwingson  
Pat & Theodore Eliot  
Jeannette & Whitney Evans  
Katherine Fulton & Katharine Kunst  
Margaret & Arthur Grandy  
Barbara Hughes & Gregory DiPaolo  
Antoinette Kuhry & Thomas Haeuser  
Penny Magrane & Joan Howley  
Valerie Pistole & Jeffrey Walter  
Nancy Ramsey  
Karen & George Rathman  
Joshua Rymer & Timothy Frazer  
Lorna & Barry Sheridan

Margaret Van Camp  
Donald Van de Mark  
Judy & Charles Young

## SONOMA VALLEY FUND ADVISORS 2016

Joe Aaron  
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  
Susan Hoeffel  
Steve Kyle  
Jim Lamb  
John Leland  
Marcia Levy  
Steve Page  
Steve Pease  
Jon Parker  
George Rathman  
Martha Rosenblatt  
Maggie Salenger-Haywood  
Hank Sandbach  
Dave Stollmeyer  
John Story  
Jeffrey Walter  
Rick Wynne  
Barbara Young

## COMMUNITY FOUNDATION SONOMA COUNTY STAFF

Elizabeth Brown, *President and CEO*  
Karl Grimm, *Vice President for  
Finance and Operations*  
J. Mullineaux, *Vice President for  
Philanthropic Planning*  
Karin Demarest, *Vice President  
for Programs*  
Miguel Ruelas, *Director of  
Philanthropic Advising*

## FUND BALANCES AS OF DECEMBER 31, 2016 *(unaudited)*

Sonoma Valley Affiliate Funds	\$162,245
Sonoma Valley Donor-Advised Funds	\$546,167
Nonprofit Partner Funds-Designated and Agency	\$2,072,249
<b>TOTAL FUNDS</b>	<b>\$2,618,416</b>

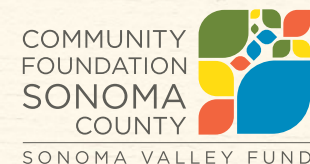
Revocable Promises to Give *(estimated, not included above)*: **\$12,254,000**

## SONOMA VALLEY FUND

C/O Community Foundation  
Sonoma County

120 Stony Point Road, Suite 220  
Santa Rosa, CA 95401  
707-579-4073

[sonomavalleyfund.org](http://sonomavalleyfund.org)  
[sonomacf.org](http://sonomacf.org)



*An affiliate of  
Community Foundation Sonoma County*