

YOUR COMMUNITY. YOUR LEGACY.

SONOMA VALLEY FUND

TAKING CARE OF BOTH.



*Strengthening Our Community Through
Philanthropy and Legacy Giving.*

TO OUR FRIENDS

In 2011, Sonoma Valley Fund, an affiliate of Community Foundation Sonoma County, celebrated its fifth anniversary. Our organization is still young, but 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.

GRANT-MAKING CAPABILITIES INCREASE

Since its founding in 2007, Sonoma Valley Fund has awarded \$263,000 in grants and scholarships to local nonprofits and individuals. Community Foundation Sonoma County, our parent organization, has helped direct an additional \$842,000 in the valley for a combined total of more than \$1.1 million.

In 2011 alone, we jointly awarded \$55,400 in grants, including \$34,000 through our stewardship of the George and Phyllis Ellman Fund, which we have administered since 2008. We also laid the groundwork for primary stewardship of the \$8.5 million Todd Trust, completing a comprehensive needs assessment with Community Foundation Sonoma County in May to identify how best to fulfill the wishes of longtime Glen Ellen residents Hazel and Roland Todd. The first grant from their generous bequest matched funds raised by the community to support the Youth Initiative. We will award additional grants in 2012.

YOUTH INITIATIVE TAKES FLIGHT

The tragic 2007 death of a teenage boy in Maxwell Park inspired Sonoma Valley Fund to develop the Youth Initiative, launching and incubating a series of summer and after-school enrichment programs to help at-risk children transition smoothly from elementary to middle school, and from middle school to high school. After successfully serving some 500 students over two years, we transferred operation of the programs to the Sonoma Valley Unified School District in 2011 with an appeal to the community at large to help sustain the initiative's valuable work.

"Sonoma Valley Fund's Youth Initiative programs identified an important need for our at-risk kids and did something heroic about it. Their work must continue for the sake of our students."

— Louann Carlomagno, Superintendent,
Sonoma Valley Unified School District

NONPROFIT PARTNERSHIPS GROW

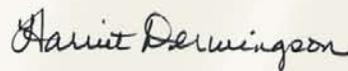
Sonoma Valley Fund brings area nonprofit organizations together around the common goal of long-term financial health. We help them develop endowment and legacy giving programs that keep them resilient in changing economic times and provide access to professional advisors. If they invest through Community Foundation Sonoma County, organizations also gain effective fund management and the fulfillment of many fiscal oversight and compliance requirements on their behalf. Our nonprofit partnerships now number a record 20, and their managed investments now exceed \$2 million. In 2011, our Nonprofit Services Committee handed off the results of its 2010 cost study to the Executive Directors' Roundtable for implementation. Over time, the initiative should help participating valley nonprofits reduce operating expenses by as much as \$375,000 per year.

LEGACY PROGRAM EXPANDS

Sonoma Valley Fund offers a range of giving options that accommodates all estate values and asset types, and that enables donors to direct their contributions to any nonprofit, to donate now or later, within Sonoma Valley or beyond. In 2011, we established the Sonoma Valley Legacy Circle to recognize those who opt to support the community through their estate plans. Legacy gifts, or revocable promises to give, have now reached an estimated \$3.5 million. We also announced **Endow Sonoma Valley Month**, an ambitious program designed to promote legacy giving through a series of free educational events. It will take place in October 2012.

These results 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 invite you, if you haven't already, to join us in working to secure a bright future for the community we love.

Sincerely,



Harriet Derwingson
Sonoma Valley Fund Board President, 2010–11



Photo: Zanne Clark

HONORING VALLEY VOLUNTEERS

More than 250 guests attended Sonoma Valley Fund's third annual Star Volunteer Awards in October at Hanna Boys Center to recognize 23 individuals and teams for their community service. Our nonprofit partners selected the recipients. Rabobank underwrote the celebration.

GRANT MAKING IN 2011

Sonoma Valley Fund awarded seven grants from the **GEORGE AND PHYLLIS ELLMAN FUND** to support a diversity of work:

BOUVERIE PRESERVE, AUDUBON CANYON RANCH – trail improvements; creation of new seasonal wetlands

SONOMA LAND TRUST – improvements to two scenic overlooks on the Loop Trail at Glen Oaks Ranch

SONOMA COMMUNITY CENTER – creation of the Center for Sustainable Living, which encourages conservation, organic farming, and farm-to-table cooking; construction of an outdoor learning center

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 1,100 students annually

SONOMA CLASSICAL MUSIC SOCIETY – support for live local performances

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 and secondarily on Sonoma County overall. In 2011, the Foundation and its affiliate Sonoma Valley Fund released a report summarizing goals and priorities for use of the trust. After interviewing 75 community organizations, elected officials, and residents, and commissioning the first comprehensive study of local demographic and economic trends, the committee determined that initial grants will go toward improving the health and well-being of residents in the unincorporated Springs neighborhoods of Sonoma Valley.



George and
Phyllis Ellman



Hazel and
Roland Todd

ENDOW SONOMA VALLEY MONTH

In October, the Sonoma City Council and Sonoma County Board of Supervisors proclaimed October 2012 as “Endow Sonoma Valley Month.” Gary and Marcia Nelson, founders of the Nelson Emergency Care Fund for Sonoma Valley, will serve as official ambassadors for the series of free public seminars, panel discussions, and other educational events designed to dramatically increase the number of residents who include Sonoma Valley in their estate plans.



Gary and
Marcia Nelson

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 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.

SONOMA VALLEY FUND NONPROFIT PARTNERS

The following 20 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
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
Vintage House
WillMar Family Grief & Healing Center

“Through collaboration, we all can benefit from the experience and connections that Sonoma Valley Fund brings to our community.”

— Richard Dale, Executive Director,
Sonoma Ecology Center

DONORS AND LEGACY GIFTS

Beth and Joe Aaron
 Peggy and Russell Bair
 Jurine Biers
 Ellen and Drew Bradley
 Libby and John Brady
 Janice and Bill Burrow
 Karen Collins
 Community Foundation
 Sonoma County
 Harriet and Randy Derwingson
 Sandy and Dick Drew
 Pat and Ted Eliot
 Phyllis and George Ellum Fund
 Jeanette and Whitney Evans
 Peter Evans
 Scott Raymond Evans Foundation
 Exchange Bank
 Gemma Gallovich and
 Theodore J. Cutler
 Lois Gordon
 Tom Haeuser and Antoinette Kuhry
 R. Stuart Hummel
 Kiwanas Club of Sonoma Plaza

Margaret and Stephen Kyle
 Jim Lamb
 John and Sandra Leland Foundation
 Marcia and Jim Levy
 Minigan Family Foundation
 Marcia and Gary Nelson
 Joyce and Steven Pease
 Peirce Family Fund of Marin
 Community Center
 Valerie Pistole and Jeffrey Walter
 Rabobank
 George and Karen Rathman
 Martha and Stephen Rosenblatt
 Rotary Club of Sonoma Valley
 Joshua Rymer and Tim Frazer
 Maggie Salenger Haywood and
 Peter Haywood
 Victor and Susanne Sangiacomo
 Vicki and David Stollmeyer
 Hazel and Roland Todd Trust
 Vadasz Family Foundation
 Ann Weeks and Arleen Curry
 Barbara Young

SONOMA VALLEY FUND BOARD 2011

Harriet Derwingson, *President*
 Barbara Young, *President Elect*
 Tom Haeuser, *Secretary*
 Donna Halow, *Treasurer*
 Whitney Evans, *President Emeritus*
 Joe Aaron
 Peggy Bair

Karen Collins
 Tony Garcia
 Steve Pease
 Martha Rosenblatt
 Joshua Rymer
 Scott Smith

SONOMA VALLEY FUND ADVISORS 2011

Simon Blattner
 John Brady
 Suzanne Brangham
 Louann Carlomagno
 Arleen Curry
 Ted Cutler
 Christine Dohrmann
 Richard Drew
 Theodore Eliot, Jr.
 Robert Erskine
 Lois Gordon

Maggie Salenger Haywood
 Steve Kyle
 Jim Lamb
 John Leland
 Marcia Levy
 Gary D. Nelson
 Jon Parker
 Hank Sandbach
 John Story
 Jeffrey Walter

SONOMA VALLEY FUND GRANT COMMITTEES 2011

ELLMAN FUND

Maggie Salenger
 Haywood, *Chair*
 Judith Bjorndal
 Karen Collins
 Susan Cook
 Ethel Daly
 Steve Kyle
 Steve Pease

TODD TRUST

Loretta Carr
 Alejandra Cervantes
 Harriet Derwingson
 Dianne Edwards
 Ted Eliot
 Donna Halow
 Camarino Hawing
 Maite Iturri
 George Rathman
 Dave Stollmeyer
 Barbara Hughes
 Robert Judd
 Joe Valentine

SONOMA VALLEY FUND

NONPROFIT SERVICES INITIATIVE

Karen Collins and
 Donna Halow,
Co-chairs
 Suzanne Brangham
 Arlene Curry

Pam Gibson
 Barbara Hughes
 Gary D. Nelson
 Steve Pease

SONOMA VALLEY FUND

YOUTH INITIATIVE COUNCIL

Dick Drew, *Chair*
 Ellen LaBruce,
Council Executive
 Karla Conroy
 Pilar Cruz
 Camarino Hawing

Maite Iturri
 Steve Pease
 Maricarmen Reyes
 Bret Sackett
 Lez Vadasz
 Barbara Young

COMMUNITY FOUNDATION

SONOMA COUNTY STAFF

Barbara Hughes,
President and CEO

Joe Valentine,
Affiliate Relations Officer

FUND BALANCES AS OF DECEMBER 31, 2011 *(unaudited)*

Sonoma Valley Affiliate Funds	\$106,300
Sonoma Valley Donor-Advised Funds	\$391,800
Sonoma Valley Nonprofit Partner Funds	\$2,086,100
TOTAL FUNDS	\$2,584,200

Revocable Promises to Give (estimated, not included above): \$3,500,000



An affiliate of Community
 Foundation Sonoma County

SONOMA VALLEY FUND
 Box G
 Sonoma, California 95476
 707-579-4073

www.sonomavalleyfund.org
www.sonomacf.org