

*The oak is the legacy of the acorn*



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COMMUNITY IS THE LEGACY OF GIVING

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## COMMUNITY IS THE LEGACY OF GIVING

It is with great pride that the Board of the Sonoma Valley Fund issues its first annual report to the community. The community response to the benefits of having a fund whose Board is comprised of Sonoma Valley residents and whose goal is to support Sonoma Valley nonprofits through the creation of a permanent endowment fund has far exceeded our expectations. The financial information on this page is an important measure of our first year success. However, a more important measure has been the dedication and support of our outstanding board members and advisors; they are listed on the fourth page of this report.

The Sonoma Valley Fund is an affiliate of Community Foundation Sonoma County. Our success would not have been possible without its support. Donors have confidence that their funds will be professionally managed by the Community Foundation's Investment Advisory Committee. Donors receive expert advice on the most beneficial ways to make gifts that would benefit Sonoma Valley nonprofits and other charities of importance to them.

Several nonprofits elected to become partners with the Sonoma Valley Fund and more will join in 2008. The Boys & Girls Club Valley of the Moon, Vintage House and the Sonoma Valley Museum of Art are partners. Their endowment or special funds are invested by the Community Foundation. The Sonoma Valley Fund helps explain endowment giving to their members and supporters, thus helping to build the partners' endowment program.

Our major goals for 2008 are to significantly increase the Valley's understanding of the mission and goals of the Sonoma Valley Fund and to focus our resources on an important community need, the gang prevention initiative.

A special thanks to our donors who are listed to the right. Please contact us about joining them in 2008. Visit our website, [www.sonomavalleyfund.org](http://www.sonomavalleyfund.org), or call me at (707) 939-1522.

**Whitney Evans**, Board President

## 2007 DONATIONS AND LEGACY GIFTS

Drew and Ellen Bradley  
 John and Libby Brady  
 Susan and Lew Cook  
 Harriet and Randy Derwingson  
 Ted and Pat Eliot  
 George and Phyllis Ellman  
 Whitney and Jeanette Evans  
 Skye Hallberg/Cogito Creative  
 Tom Haeuser and Antoinette Kuhry  
 Steven and Troy Hightower  
 Leslie King/King Family Fund  
 Steve and Holly Kyle  
 Jim and Charlotte Lamb  
 John and Sandra Leland  
 Marcia and Jim Levy  
 Gary and Elsa Nelson  
 Steve and Joyce Pease  
 JaMel and Tom Perkins  
 Martha and Steve Rosenblatt  
 Clifford Scarborough/Sage Computing  
 David and Vicki Stollmeyer  
 John and Pam Story  
 Jeffrey and Valerie Pistole Walter  
 Charles Williams  
 Community Foundation Sonoma County

## 2007 GRANTEES

Boys and Girls Club Valley of the Moon  
 La Luz Center  
 Nonprofit Collaborative  
 Sonoma Ecology Center  
 Sonoma Overnight Support  
 Sonoma Valley Mentoring Alliance  
 Sonoma Valley Museum of Art  
 Valley of the Moon Natural History Association

## ESTIMATED FUND BALANCES AS OF DECEMBER 31, 2007 (not audited)

UNRESTRICTED FUNDS FOR SONOMA VALLEY	
Sonoma Valley Endowment Fund	\$24,200
Sonoma Valley Expendable Fund	25,800
Sonoma Valley Operations Fund	4,200
<b>TOTAL UNRESTRICTED FUNDS</b>	<b>\$54,200</b>
DONOR-ADVISED FUNDS:	
Ellman Fund for Sonoma Valley	†
Whitney & Jeanette P. Evans Fund	†
Tom & JaMel Perkins Fund	†
<b>TOTAL DONOR-ADVISED FUNDS</b>	<b>\$188,700</b>
NONPROFIT PARTNER FUNDS:	
Boys & Girls Club Valley of the Moon Fund	\$78,400
Vintage House Fund/Jim & Charlotte Lamb Endowment Fund*	
Sonoma Valley Museum of Art/Charlotte Lamb Exhibition Reserve Fund	174,000
<b>TOTAL NONPROFIT PARTNER FUNDS</b>	<b>\$252,400</b>
<b>TOTAL OF ALL FUNDS</b>	<b>\$495,300</b>
Revocable Promises to Give: <b>\$4,982,800</b>	
<i>Note: Legacy or Planned gifts that are revocable are not included in financial reports</i>	



Over 300 Sonoma Valley students participated in the Worldwide GIS Day at Boys and Girls Club Valley of the Moon where they learned about real-world applications of Geographic Information System technology.



During 2007, Sonoma Valley Fund's first year of operation, we were pleased to be able to award grants totaling more than \$23,000 to local Sonoma Valley organizations. These grants supported a wide diversity of work, including promoting and enhancing community-wide events such as a Geographic Information Systems Day, the Watershed Walk and a Dia de los Muertos celebration, trainings to improve client services and mentoring skills and build capacity for effective strategic planning and board development, and underwriting gang prevention forums.

Our competitive grants program was designed specifically to complement the competitive grants offered by Community Foundation Sonoma County, and to give local groups an additional source for funds. We offered grants in two areas – Branch Out Grants for programs or events that help build community and Strong Roots Grants for projects that strengthen a nonprofit's capabilities.

Through the continued support of donors and the growth of our endowment over time, the Sonoma Valley Fund is committed to providing a permanent source of funds to benefit our entire community.

**Harriet Derwingson, Chair, Grants Committee  
SONOMA VALLEY FUND**

We are very excited to celebrate the first successful year with the founding board members and advisors of the Sonoma Valley Fund, the newest affiliate of Community Foundation Sonoma County.

Led by Board President Whitney Evans, the personal enthusiasm and generosity of this group has already inspired friends and neighbors to join them in a concerted effort to provide for Sonoma Valley's future well being. The goal to build an endowment fund, led with their own commitments, to ensure a legacy of support for nonprofit organizations in Sonoma Valley, is most commendable. At the same time, the Sonoma Valley Fund has been quick to respond to immediate local needs with a \$23,000 grantmaking program and by supporting the community forums on gang prevention efforts.

Please know that the Community Foundation staff is always ready to assist donors in the Sonoma Valley with achieving their planned giving goals as well as establishing donor-advised funds. I offer my congratulations to this dynamic group on its impressive accomplishments in fundraising, awareness building and grantmaking as illustrated in its first Annual Report.

**Kay M. Marquet, President/CEO  
COMMUNITY FOUNDATION SONOMA COUNTY**



## BENEFITS OF THE SONOMA VALLEY FUND

### Ellman Gift

George and Phyllis Ellman made a significant gift to the Sonoma Valley Fund. The Ellmans chose the Sonoma Valley Fund, trusting the board of directors to keep apprised of the most important needs and opportunities in the community, thereby ensuring that their charitable gifts are most effective. George said, "We want this gift to set an example for others in the Valley to see what can be done with this new Sonoma Valley Fund."

### Bill Lynch - December 15, 2006 Index Tribune Editorial

*"We're all so busy just meeting this year's goals for our nonprofits that we rarely have time to do long-term capital building that should be part of every nonprofit organization plan.*

*It is long past time that an organization like the Sonoma Valley Fund is established here, and we urge our readers to support its worthy efforts."*

### Tom Culligan, Chair, Investment Committee, Boys & Girls Club

*"We decided to invest our endowment funds through the Sonoma Valley Fund. Although our self management with the help of some very qualified volunteers produced acceptable results, the responsibility was too much. Boards have turnover, but money management should have continuity. The Sonoma Valley Fund is local. We think investing through them will add credibility to our future solicitations."*

### Kathy Witkowicki, Executive Director, Sonoma Valley "Stand By Me" Mentoring Alliance

*"Because of a grant from the Sonoma Valley Fund, we were able to partner with the Boys & Girls Club and host a full-day training session for our staff and volunteers! When working with at-risk youth, the issues we face are ever-changing, as well as ever-challenging. This interactive forum provided a jump-start to the school year by motivating the participants and sharpening their senses, while at the same time reinforcing the good work that they are already doing with kids!"*

## 2007 SONOMA VALLEY FUND BOARD

John Brady	Thomas A. Haeuser
Susan Cook	Marcia Levy
Harriet Derwingson	Martha Rosenblatt
Whitney Evans, <i>President</i>	David Stollmeyer
	Jeffrey Walter

## 2007 SONOMA VALLEY FUND ADVISORS

Drew Bradley	John Leland
Suzanne Brangham	Lolita McKinney
Theodore L. Eliot, Jr.	Gary R. Nelson
Lois Gordon	Steve Pease
Mike M. Gusman	John Story
Jim Lamb	Barbara Young

## COMMUNITY FOUNDATION

### SONOMA COUNTY STAFF

Kay M. Marquet, President and CEO

Joseph W. Valentine, Affiliate Relations Officer



An affiliate of Community  
Foundation Sonoma County

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