

CREATING BRIDGES

*The Sonoma Valley Fund's mission is to strengthen
our community through philanthropy and legacy giving.*

Creating Bridges that Strengthen and Sustain Our Community

BRIDGES FOR LEGACY DONORS

The Sonoma Valley Fund is the bridge between donors and the nonprofit organizations they support, ensuring the prudent investment of funds and the achievement of legacy gift objectives. Through its parent, Community Foundation Sonoma County, the Fund wisely invests and fulfills donors' charitable bequests. A few of our many donors share how these valuable connections create bridges that strengthen our community now and into the future.



John and Sandra Leland

JOHN & SANDRA LELAND have been annual contributors to the Sonoma Valley Fund, designating a portion of their gift to specific charities where they see a need, but also leaving a portion to the discretion of the Sonoma Valley Fund Board to be used where their Grants Committee sees specific needs. John Leland says, "We count on the Sonoma Valley Fund Board to use a portion of our donation where they think it can do the most good."

GARY & MARCIA NELSON saw a significant need in the care of the uninsured in our valley. They founded the Gary & Marcia Nelson Emergency Care Fund to support the Sonoma Valley Hospital's care for uninsured people. Then they selected the Sonoma Valley Fund and its parent, Community Foundation Sonoma County, to manage the investments and support their marketing efforts in the community. Gary and Marcia said, "We selected the Sonoma Valley Fund as the home of our fund because we believe that its mission to provide a permanent source of charitable funds for our valley is of vital importance."



Gary and Marcia Nelson

BUCK AND SUE SANGIACOMO have established a scholarship fund to help worthy and motivated students who are seeking to further their education. "This scholarship program is our way of helping ... our attempt to create a legacy, one person at a time, in which individuals have the opportunity to make a better world for themselves and for others." The Sangiacomos have entrusted the Sonoma Valley Fund to wisely invest the scholarship funds and to assist in set-up and administration of their program, thus making their legacy a reality.



Buck and Sue Sangiacomo

DONORS AND LEGACY GIFTS

Drew and Ellen Bradley
John and Libby Brady
Robert and Blythe Carver
Susan and Lew Cook
Harriet and Randy Derwingson
Ted and Pat Eliot
George and Phyllis Ellman
Whitney and Jeanette Evans
GPM Print, Mail Solutions
Tom Haeuser and
Antoinette Kuhry
Skye Hallberg
Steven and Troy Hightower
Leslie King
Steve and Margaret Kyle
Jim and Charlotte Lamb
Ellis-Leland Foundation
John and Sandra Leland
Marcia and Jim Levy
Garrett and Elsa Nelson
Gary and Marcia Nelson
Robert and Carole Nicholas
Steve and Joyce Pease
JaMel and Tom Perkins
Martha and Steve Rosenblatt
Sage Computing
Margaret J Salenger
Buck and Sue Sangiacomo
David and Vicky Stollmeyer
John and Pam Story
Jeff Walter and Valerie Pistole
Charles Williams
Community Foundation
Sonoma County

SONOMA VALLEY FUND GRANTS PROGRAM

Sonoma Valley Fund and its donors have awarded nearly \$100,000 in grants since inception just two years ago. In 2008, 12 grants were awarded in Sonoma Valley, totaling \$59,000. These grants supported a wide diversity of work as shown here. The Sonoma Valley Fund is committed to providing a permanent source of funds to benefit our entire community.

2008 GRANTEES

Boys and Girls Clubs of Sonoma Valley – for a Geographic Information Systems Day for youth.
La Luz Bilingual Center – for Board and staff training to build capacity for effective strategic planning.
Landpaths – for creation of a trail linking Jack London State Park to Sonoma Mountain's eastern flank.
Operation Youth of Sonoma Valley – for Board and staff training to strengthen capacity and improve communications and structure.

BRIDGES TO SONOMA VALLEY NONPROFITS

The Sonoma Valley Fund is the bridge between Sonoma Valley nonprofits and the donors who support them. The expertise of Community Foundation Sonoma County, the parent of the Sonoma Valley Fund, ensures that donors' charitable wishes will be fulfilled in the most beneficial way at the end of their lifetimes and that their funds will be wisely invested. Three of our eight Nonprofit Partners offer illustrations of the kinds of bridges the Sonoma Valley Fund provides.

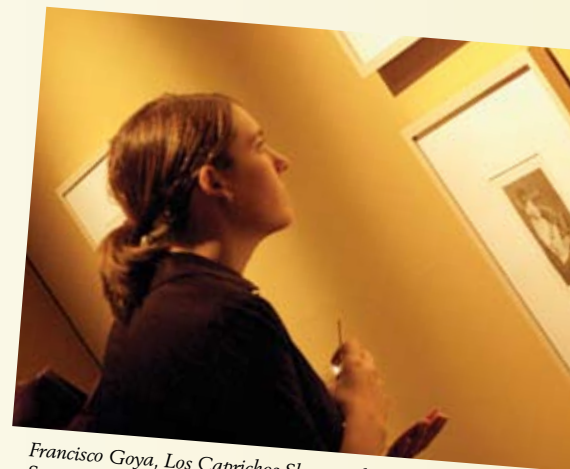
SONOMA VALLEY MUSEUM OF ART – The Sonoma Valley Fund and its parent, Community Foundation Sonoma County, invests the funds raised by the museum and supports the marketing of their Legacy Circle program. Simon Blattner, Museum President, said the choice of the Sonoma Valley Fund provided, “Three important benefits – the prudent investment of funds, planned giving expertise to help individual donors select the best ways to make their legacy gift and the marketing experience that could guide our Legacy Circle program.”

VINTAGE HOUSE – Vintage House joined the seven other Nonprofit Partners of the Sonoma Valley Fund in order to have their endowment prudently managed through Community Foundation Sonoma County and to promote legacy giving. Executive Director Cindy Scarborough said, “I am delighted with our Sonoma Valley Fund partnership and look forward to working with their prestigious Board to further our goal of strengthening our long-term finances through legacy gifts.”

SONOMA VALLEY EDUCATION FOUNDATION – The expertise in planned giving strategies and the marketing experience of its staff and Board were the primary reasons the Sonoma Valley Fund was selected. Kevin Jaggie, Board President, said, “The long-term viability and financial strength of our organization depends on building our endowment, thus providing a reliable source of funds. Partnering with the Sonoma Valley Fund will greatly enhance our success in building our endowment.”

OTHER NONPROFIT PARTNERS

Boys & Girls Clubs of Sonoma Valley
League for Historic Preservation
Gary & Marcia Nelson Emergency Care Fund
Sonoma Valley Hospital Foundation
Valley of the Moon Teen Center



Francisco Goya, Los Caprichos Show at the Sonoma Valley Museum of Art



Celebrating Veteran's Day at Vintage House



Mentoring at the Sonoma Valley Education Foundation

Sonoma Community Center – for an exhibition of 100 photographs of “Life in the Springs”.

Sonoma Ecology Center – for environmental science training for students.

Sonoma Valley Classical Music Society – for support of classical music concerts.

Sonoma Valley Historical Society – for conversion of historical film and slides to DVD.

UCRY (United Community Resources for Youth) – for a community questionnaire to better understand the needs of youth in Sonoma Valley.

Valley of the Moon Teen Center – for program development in their new center.

Vineyard Workers Services – for Board and staff development and organizational planning.

Vintage House – for a pilot project, STAMP (*Senior Transportation and Mobility Program*) for non-mobile seniors.

**2008-2009 SONOMA VALLEY FUND
BOARD**

Whitney Evans, <i>President</i>	Thomas Haeuser, <i>Secretary-Treasurer</i>
John Brady	Steve Pease
Susan Cook	George Rathman
Harriet Derwingson, <i>Vice President</i>	Martha Rosenblatt
J. Antonio Garcia	David Stollmeyer
	Barbara Young

**2008-2009 SONOMA VALLEY FUND
ADVISORS**

Simon Blattner	Jim Lamb
Suzanne Brangham	John Leland
Ted Cutler	Marcia Levy
Ted Eliot	Lolita McKinney
George Ellman	Gary D. Nelson
Robert Erskine	Vanessa Robledo
Lois Gordon	John Story
Steven Kyle	Jeffrey Walter

**2008-2009 SONOMA VALLEY FUND
GRANTS COMMITTEE**

Harriet Derwingson, <i>Chair, 2008</i>	Steve Pease
David Stollmeyer, <i>Chair, 2009</i>	George Rathman
Susan Cook	Vanessa Robledo
Margaret Salenger- Haywood	Martha Rosenblatt
	Barbara Young

**COMMUNITY FOUNDATION
SONOMA COUNTY STAFF**

J Mullineaux, <i>Vice President for Development, 579-4073 ext 20.</i>	Joe Valentine, <i>Affiliate Relations Officer, 579-4073 ext 12.</i>
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FUND BALANCES AS OF DECEMBER 31, 2008

UNRESTRICTED FUNDS FOR SONOMA VALLEY \$30,482

Sonoma Valley Endowment Fund
Sonoma Valley Expendable Fund
Sonoma Valley Operations Fund

DONOR-ADVISED FUNDS: \$206,665

Drew & Ellen Bradley Fund
Harriet & Randy Derwingson Endowment Fund
Ellman Fund for Sonoma Valley
Whitney & Jeanette P. Evans Fund
Tom & JaMel Perkins Fund
Buck & Sue Sangiacomo Scholarship Fund

NONPROFIT PARTNER FUNDS: \$1,067,155

Boys & Girls Clubs of Sonoma Valley
Gary & Marcia Nelson Emergency Care Funds
Sonoma Valley Education Foundation
Sonoma Valley Hospital Foundation
Sonoma Valley Museum of Art & Charlotte Lamb Exhibition Reserve Fund
Valley of the Moon Teen Center
Vintage House

TOTAL OF ALL FUNDS \$1,304,302

Revocable Promises to Give (estimated): \$5,094,800

Note: Legacy or Planned gifts that are revocable are not included in financial reports



*An affiliate of Community
Foundation Sonoma County*

SONOMA VALLEY FUND

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www.sonomavalleyfund.org www.sonomacf.org