

**SONOMA VALLEY FUND BOARD  
2009-2010**

Peggy Bair	Thomas Haeuser, <i>Secretary-Treasurer</i>
John Brady	Steve Pease
Susan Cook	George Rathman
Harriet Derwingson, <i>President 2010</i>	Martha Rosenblatt
Whitney Evans, <i>President 2009</i>	David Stollmeyer <i>Vice President 2010</i>
Antonio Garcia	Rick Wynne
	Barbara Young

**SONOMA VALLEY FUND  
GRANTS COMMITTEE 2009-2010**

Judith Bjorndal	Martha Rosenblatt
Susan Cook	Margaret Salenger- Haywood
Donna Halow	David Stollmeyer, <i>Chair</i>
Steve Pease	Barbara Young
George Rathman	
Vanessa Robledo	

**SONOMA VALLEY FUND  
ADVISORS 2009-2010**

Simon Blattner	Jim Lamb
Suzanne Brangham	John Leland
Ted Cutler	Marcia Levy
Karen Collins, <i>Co-Chair</i>	Pamela Martens
Christine Dohrmann	Lolita McKinney
Dick Drew	Gary D. Nelson
Ted Eliot	Jon Parker
George Ellman	Bob Peirce
Robert Erskine	Vanessa Robledo
Lois Gordon	John Story
Donna Halow, <i>Co-Chair</i>	Jeffrey Walter
Steven Kyle	

**DONORS AND LEGACY GIFTS**

Ms. Janet Bosshard	Garrett and Elsa Nelson
Drew and Ellen Bradley	Gary and Marcia Nelson
John and Libby Brady	Robert and Carole Nicholas
Robert and Blythe Carver	Steve and Joyce Pease
Susan and Lew Cook	JaMel and Tom Perkins
Harriet and Randy Derwingson	George and Karen Rathman
David E. Donnelley	Jerry Rickard
Ted and Pat Eliot	Lawrence P. Robinson
George and Phyllis Ellman	Martha and Steve Rosenblatt
Whitney and Jeanette Evans	Joseph and Evelyn Rosenblatt
GPM, Print, Mail, Solutions	Sage Computing
Tom Haeuser and Antoinette Kuhry	Mr. & Mrs. Henry A Sandbach
Skye Halberg	Peter Haywood and Maggie Salenger-Haywood
Jean Harrison	Buck and Sue Sangiacomo
Steven and Troy Hightower	David and Vicky Stollmeyer
Leslie King	John and Pam Story
Steve and Margaret Kyle	Jeff Walter and Valerie Pistole
Jim and Charlotte Lamb	Charles E. Williams
Ellis-Leland Foundation	Community Foundation Sonoma County
John and Sandra Leland	
Marcia and Jim Levy	

**COMMUNITY FOUNDATION  
SONOMA COUNTY STAFF**

Barbara Hughes, <i>President and CEO</i> 579-4073 ext 16.	Joe Valentine, <i>Affiliate Relations</i> <i>Officer, 579-4073 ext 12.</i>
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YOUR COMMUNITY. YOUR LEGACY.

SONOMA VALLEY FUND

TAKING CARE OF BOTH.



Photo of Quarryhill Botanical Garden courtesy of Patricia Brownlee

**FUND BALANCES AS OF DECEMBER 31, 2009 (not audited)**

<b>UNRESTRICTED FUNDS FOR SONOMA VALLEY:</b>	<b>\$77,236</b>
<b>DONOR-ADVISED FUNDS:</b>	<b>\$163,708</b>
<b>NONPROFIT PARTNER FUNDS:</b>	<b>\$11,600,017</b>
<b>TOTAL OF ALL FUNDS</b>	<b>\$11,840,961</b>

 Revocable Promises to Give (estimated): **\$3,474,400**
*Note: Legacy or Planned gifts that are revocable are not included in financial reports*

 An affiliate of Community  
Foundation Sonoma County

**SONOMA VALLEY FUND**

 Box G  
 Sonoma, California 95476  
 707-579-4073 ext 12  
 www.sonomavalleyfund.org  
 www.sonomacf.org

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

*The 2009 Annual Report is dedicated to the  
memory of Phyllis and George Ellman*



# The Youth Initiative

## SUSTAINING OUR COMMUNITY FOR THE NEXT GENERATION

In early 2009, the Sonoma Valley Fund established a Youth Initiative Committee to explore the many challenges facing Sonoma Valley's youth, and to attempt to address important community concerns such as the perceived low numbers of local high school students going on to college or meaningful jobs, continuing reports of significant drug and alcohol problems among Valley youth, and disappointing levels of academic performance versus comparable schools around the state.

Over a nine-month period, the Committee met with more than sixty people, all of whom are intimately involved with youth issues in Sonoma Valley, including middle and high school students, parents, heads of youth-oriented nonprofits, school administrators and teachers, local experts, philanthropists, and others who have been involved with youth issues for years. The outcome of these discussions was the development of specific recommendations to benefit Valley youth of all ages, with the primary focus on programs and activities directed at late elementary and middle school kids.

To implement the recommendations, Sonoma Valley Fund has formed a new Coordinating Council for Youth Development in Sonoma (CCYDS – pronounced Kids.) The Youth Initiative is an important example of ways in which the Sonoma Valley Fund works to strengthen our community, as we are uniquely positioned to organize consortiums, like CCYDS, where combined resources can accomplish a common purpose.

## CELEBRATING COMMUNITY

Quarryhill Botanical Gardens was the setting for the Sonoma Valley Funds' annual celebration held on July 13 this past year, where the fund honored special volunteers selected by its non-profit partner organizations, recognizing them as "Sonoma Valley Stars." The range of volunteer activities performed by the awardees covers everything from cooking meals for teens, bringing cheer and flowers to those hospitalized and helping seniors prepare tax returns to spearheading fundraising events. Their levels of commitment and longevity of service as described by the presenting host from each organization are truly inspiring. This was SVF's third annual celebration for donors, nonprofit partners and community leaders. Over 200 guests wandered through Quarryhill's Asian woodland gardens, learning about its unique botanical species from Executive Director Bill McNamara and docents, while enjoying refreshments prepared by Sonoma Valley Fund's Board members and Advisors.



Sonoma Valley Stars Volunteers

## CELEBRATING LEGACY GIVING

On Sunday afternoon, December 6, 2009, more than 90 legacy donors to Sonoma Valley Fund and our nonprofit Partners thrilled to the classical and contemporary music of Musaïc, an a cappella men's chorus based in San Francisco. The concert, which was held in the extraordinary and elegantly decorated wine cave of our generous hosts, Renée and Rick Dellar, kicked off the holiday season with flair, and was followed by champagne and chocolates, as well as other treats. Sonoma Valley Fund thanks Musaïc and our hosts for helping to create this unique opportunity to recognize and celebrate legacy giving.



Post-concert in the Cave

## COORDINATING COUNCIL FOR YOUTH DEVELOPMENT IN SONOMA (CCYDS)

- Dick Drew, *Chair*
- Ellen La Bruce, *Council Executive*
- Karla Conroy
- Pilar Cruz
- Cam Hawing
- Maité Iturri
- Steve Pease
- Maricarmen Reyes
- Brett Sackett
- Les Vadasz
- Barbara Young

## SONOMA VALLEY FUND PARTNERS

The partnership between the Sonoma Valley nonprofits and the Sonoma Valley Fund has the goal of developing valley-wide interest and commitments to make legacy gifts to the nonprofits that individual donors have supported during their lifetime. To endow our nonprofits through legacy gifts assures each nonprofit of a secure source of funds in the future to continue its important mission in our valley. Three of our newest partners describe why they joined the Sonoma Valley Fund partnership.



La Luz Center

"LA LUZ CENTER reached out to The Sonoma Valley Fund as a viable and strong partner," reported Stephen Dale, Executive Director. Dale said, "We feel it is a good safe and visible place to invest funds. It opened doors for opportunities by bringing new donors to our organization. Its relationship with the Community Foundation has helped us with additional grant opportunities. The Sonoma Valley Fund has taken a lead role with many new projects, including the youth initiative and researching the needs of kids in our community. La Luz Center is proud to be a partner of an organization who is a leader, helping non-profits continue their work in the best interests of Sonoma Valley."

– Partner 2009



Pets Lifeline

PETS LIFELINE joined the other nonprofits involved in the Sonoma Valley Fund for the access to the resources and expertise in bequests, endowments and planned giving for which they are so respected. George Bradley, Board President, said, "A long-term endowment program will put Sonoma Valley's only animal shelter on a path to a more stable financial future. Partnering with the Sonoma Valley Fund, combined with patience and perseverance over time in building and growing our endowment, will be the key elements to our success."

– Partner 2009



Sonoma Valley Mentoring Alliance

Shared values is a key reason that the Sonoma Valley Fund makes an ideal investment partner for the SONOMA VALLEY MENTORING ALLIANCE, which is poised to expand its legacy giving program this year. Development Director Laura Zimmerman says, "We have the expertise in improving the lives of at-risk students in our Valley, and the Sonoma Valley Fund has the expertise in legacy giving and marketing. This partnership is key to our long term financial strength and success."

– Partner 2009

## Our Other Partners Are

Becoming Independent	Since 2010
Boys & Girls Clubs of Sonoma Valley	2007
Hanna Boys Center	2009
Gary and Marcia Nelson Emergency Care Fund	2008
Quarryhill Botanical Garden	2009
Sonoma Ecology Center	2010
Sonoma League for Historic Preservation	2008
Sonoma Valley Education Foundation	2008
Sonoma Valley Hospital Foundation	2008
Sonoma Valley Museum of Art	2007
Valley of the Moon Teen Center	2008
Vintage House	2007

## Grant Making in Sonoma Valley

In 2009 Sonoma Valley Fund, with Community Foundation Sonoma County and their donors, awarded \$265,550 to the local community in grants and scholarships. Sonoma Valley Fund awarded six grants from the George and Phyllis Ellman Fund totaling \$25,500, to support a diversity of work as shown here.

### 2009 SONOMA VALLEY ELLMAN FUND GRANTS

**LANDPATHS** - To support Flowery Elementary School 3rd grade program In Our Own Backyard connecting students with nature while also supporting broader education needs.

**QUARRYHILL BOTANICAL GARDEN** - To support environmental education tours for SVUSD 4th & 5th grade students at QBG, an Asian woodland comprised of wild-collected, species plants.

**SONOMA ECOLOGY CENTER** - To support the K-12 Watershed Education Project which delivers environmental science content and outdoor experiences for over 1,000 students per year.

**SONOMA LAND TRUST** - To flag and develop (with largely volunteer labor) two low-key, gentle loop trails through the back country of the Glen Oaks Ranch to make the property more accessible to visitors.

**SONOMA LEAGUE FOR HISTORIC PRESERVATION** - To present the newly renovated Hooker House to the public, installing exhibits, signs and creating brochures and schedules.

**SONOMA CLASSICAL MUSIC SOCIETY** - To assist in presenting classical music programs in Sonoma.