

2013 ANNUAL REPORT

30 years of investing in the promise of sonoma county

COMMUNITY  
FOUNDATION  
SONOMA COUNTY



# 2013

Dear Friends,

**Results, stewardship, and legacy** are some of the bywords that we consider each year as we prepare this annual report to share with you. We also consider dates and milestones to help put your partnership with the Community Foundation into perspective. We are excited about what we've achieved with your help and strive to build upon our history to do more.

Our roots run deep. Community Foundation Sonoma County was founded in 1983 with a modest \$9,000 in start-up monies. The first grants were made in 1984, with \$1,500 each distributed in support of the arts, education, environment, and human services—the four core areas we still serve most robustly today.

2013 was a big year, as it was Community Foundation Sonoma County's 30th anniversary, the 10th anniversary of our Healdsburg Area Fund, and the 7th year of the Sonoma Valley Fund. Over the course of three decades, we're proud that Community Foundation Sonoma County and its two affiliates have distributed over \$128 million in funding to our area and made more than 11,000 grants here at home and beyond.

Through the generosity of our donors, we distributed \$10.4 million in 2013 to nonprofit organizations committed to improving the lives of all who live here. Their work runs the gamut, from providing educational programs for students to preserving our open spaces to providing access to the arts to ensuring daily support of basic human needs. We continued to seek ways to leverage funding, ideas, and partnerships through initiatives such as Cradle to Career and Upstream Investments. We were also a key collaborator in the inaugural ieSonoma event, bringing together hundreds of educators and leaders with internationally known speakers for the purpose of making Sonoma County a leader in innovation and creativity in education.

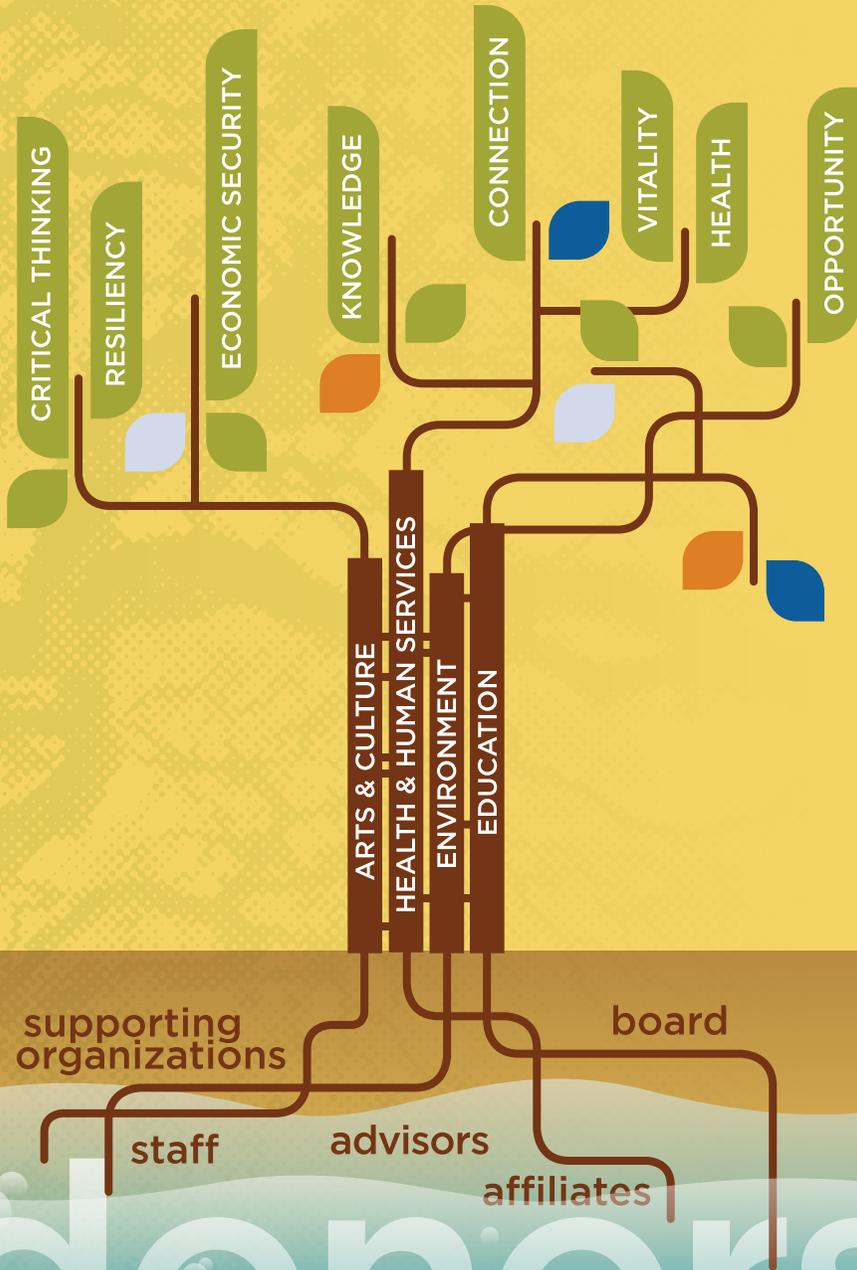
As we look back on the past 30 years and forward to the coming decades, we see a renewed community charter of charitable giving in perpetuity to assist our neighbors, strengthen our towns and cities, and support the lives of every individual fortunate enough to reside in Sonoma County. We're so grateful to you for placing your trust in Community Foundation Sonoma County. It's our honor to participate in such a richness of vision, philanthropy, and legacy as you have guided us to serve.



Harriet Derwingson  
Board Chair



Elizabeth Brown  
President and CEO



# STAFF

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President and CEO

Leanna Edwards  
Executive Assistant

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Vice President for Philanthropic Planning

Miguel Ruelas  
Director of Philanthropic Advising

Kristin Nelson  
Philanthropic Advisor

Carolyn Dunn  
Donor Services Coordinator

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Karl Grimm  
Vice President for Finance and Operations

Lynda Desloges  
Controller

Rachel Harstad  
Office Administrator

## PROGRAMS

Karin Demarest  
Vice President for Programs

Elly Grogan  
Program Associate



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# BOARD OF DIRECTORS

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Secretary

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Dianne Edwards

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Patrick Emery

Steve Goldberg

Whitney Hall

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Andrea Learned

Susan Lentz  
(Affiliate Board Member - Healdsburg)

Steven Rabinowitsh

Lew Reid

Joshua Rymer  
(Affiliate Board Member - Sonoma Valley)

Marlene Soiland

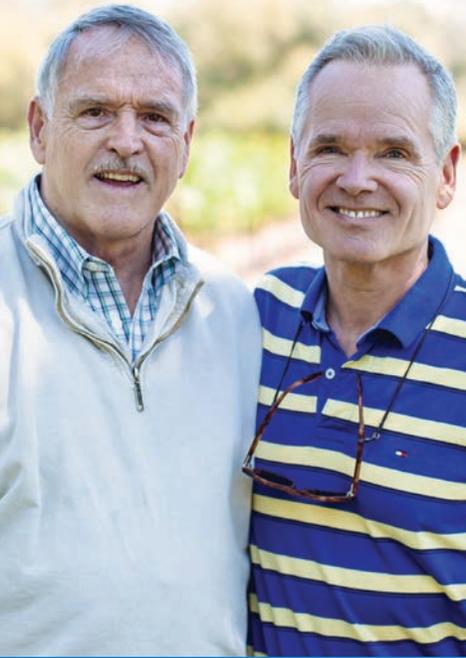
Jean Schulz  
(Director Emeritus, Non-Voting)

David J. Voss

Joan C. Woodard

Michelle Zygielbaum

# CREATING LEGACY



## GEORGE TUTTLE & BEN CUSHMAN

With Pinot Noir vineyards spread out below him, George Tuttle sits on his porch and surveys the West County home he shares with spouse Ben Cushman.

When asked to explain his philanthropy, he shakes his head. “The guilt factor is pretty high when you’re sitting here in Sonoma County on your nice deck and all of these awful things are going on all around the world,” he says.

Ben says, “Philanthropy is a learned practice that feeds on itself and, in my case, George was the one who made it clear many years ago that this was important.” He smiles. “I was not a hard case to convert.”

George is a retired corporate attorney; Ben is a retired CEO now active in nonprofit board work. The couple moved from San Francisco to Sonoma County permanently in 2005. Looking

to become involved with their new community, they came to the Community Foundation.

Education, hunger, the international refugee crisis, and civil rights are among the causes dear to their hearts, and sitting on the porch ignoring those needs is simply not an option.

In 2013, the couple was introduced to the Giving Circle concept by the Community Foundation and chose to support the LGBTQI community. “I’m excited about having the Community Foundation provide leadership in terms of bringing opportunities to us,” Ben says of this new Giving Circle.

“For us,” Ben says, “there’s always a struggle around: Are we doing enough? Are we giving enough? Can we be doing more? We don’t have an answer,” he says, looking at George. “We live that question all the time.”

Investing in the promise of Sonoma County . . . Arts and Culture: 114 grants **\$3.2M**

Health & Human Services: 397 grants

## LEGACY SOCIETY

*We gratefully acknowledge members of the Community Foundation's Legacy Society who have chosen us to steward their future planned gifts.*

Beth and Joseph Aaron  
Tania Amochaev  
Ellen I. Amsterdam-Walker  
and Donald B. Walker  
Judith and Paul Archambeau  
Maile and Warren Arnold  
Nichole and Todd Au  
Lori and Chris Baker  
Phyllis and Chris Baldenhofer

Barbara Banke  
Diana and Steve Barclay  
Sharon Bard  
Genevieve Barnhart  
Charlotte and Leon Beck  
Margaret Beeler  
and Thomas R. von Tersch  
Stephen A. Bessone  
Judith C. Bjorndal and Ron Wallachy

Fay H. Blair  
Cynthia Boaz and Jason Liles  
Brennie and Larry Brackett  
Ellen and Drew Bradley  
Libby and John Brady  
Demaris Brinton  
and Theron O'Connor  
Mary and F. James Brock  
Lawrence Broderick

Sara and Dixon Browder  
Barbara D. Brown  
Elizabeth Brown  
Karen and Leland Bushnell  
Cindy Butner  
Blythe and Robert Carver  
Ron Casentini  
Suzanne and Doug Castino  
Norma and Lee Chandler

# FAMILY GIVING

## DEAN & BELINDA SOILAND

Family is paramount to Dean and Belinda (Bo) Soiland. So is faith. Dean, like most of his siblings, got his start in his father Marv Soiland's sand and gravel business before he and Bo launched their BoDean Company for aggregates and asphalt in 1989. Along the way, they had three children of their own while supporting several children in South and Central America. And through it all, good times and bad, they have always given 10 percent of their income away.

Dean credits his upbringing for their habit of tithing. Bo's mother had to seek welfare when she and her three siblings were children. She was embarrassed by the help then, but understands it now. "That translates today into me having compassion for people who don't have the means and the gifts that we do in our business," she says.

Because family is paramount, Dean and Bo have brought their three children, ages 25, 23, and 15, into the philanthropic fold. "I see the Foundation as being an entity that helps our children with the whole component of giving and serving," Dean says. "I listen to Bo talk to our oldest son, and she tells him, it's not about yourself. It's about learning to give to others."

The couple feel that involving their children in their own estate planning and Community Foundation giving has also helped ease them into adulthood.

Bo says, "We don't want to leave everything to our kids. We would love to give it all to charity. Hopefully, our children will be able to pick that up and learn for themselves the joy of giving!"



Education & Scholarships: 373 grants **\$1.8M**

Other: 79 grants **\$725K**

**\$3.8M**

Environment: 74 grants **\$947K**

Janet D. and Harvey Charnofsky  
Sandy and John Chute  
Zanne Clark  
Mollie and Dennis Collins  
Nancy and Cole Cornelius  
Ben Cushman and George Tuttle  
Debbie Drechsler and Greg Cutler  
Gemma Gallovich  
and Theodore J. Cutler

Harriet and Randy Derwingson  
Kathy Kent and John Dolinsek  
Dr. Nancy Doyle  
Jane and Herb Dwight  
Susan and Bruce Dzieza  
Pat and Theodore L. Eliot  
Barbara Epstein  
Roberto Esteves  
Jeanette and Whitney Evans

Lyn Fischbein  
Adrienne and Ed Flowers  
Lisa Folsom-Ernst and Richard Ernst  
Clarence Garzoli  
Robert Gilchrist  
Jennifer and Rick Girvin  
Donna Gleckler  
Julia L. Grant  
Michelle and David Green

George S. Greeott  
Antoinette Kuhry  
and Thomas A. Haeuser  
Mary and Dick Hafner  
Austin Hall  
Donna Halow  
Jean and Paul Hammond  
Paula and Albert G. Handelman  
Stu Harrison and David Ring

Dorothy Hassett  
Gloria A. Hattie  
Douglas Heen and William Scogland  
Kate Burroughs and David Henry  
Marie C. Hicklin  
Susie and Jan Hoeffel  
Linda Honeysett  
Barbara A. Hughes  
Betty Jo Cox-Jones and Rod Jones

# COMMUNITY RESOURCE



## LA LUZ CENTER

When activist Ligia Booker founded La Luz Center in 1985, the Sonoma Valley Latino population was largely transient, composed of seasonal workers who returned to their native countries once the harvest was done.

By 2013, however, the community had stabilized. Serving some 10,000 people a year, La Luz now focuses its resources on helping year-round Latino citizens live better lives in the U.S.

“We’re shifting from the ‘give the fish’ model to teaching our clients how to fish,” says La Luz Executive Director Juan Hernandez. “The organization is really responsive to what’s happening in the community.”

And what’s happening in the community is that, as the population has put down roots, its needs have grown and changed. While La Luz used to mainly offer emergency assistance to their clients,

they now extend such long-term help as filing tax returns, navigating the Affordable Care Act, teaching computer literacy and parenting skills, and offering English as a Second Language (ESL) courses.

The Community Foundation granted La Luz \$93,500 in 2013, the vast majority of which came from the Roland and Hazel Todd Fund, specifically earmarked for La Luz’s ESL program.

“One of the cycles we’re trying to break is the cycle of parents not knowing English. Their kid is translating everything,” Juan says of the program. “And then the power dynamics shift within the family.”

The County of Sonoma gave La Luz a Jefferson Award in 2013 in recognition of their decades of service. It was a gesture that resonates.

Juan says, “We’ve been in existence for 29 years but that made us feel validated. It’s like people finally know who we are.”

**TOTAL: 1,037 grants**  
**368 nonprofits \$10.4M**

Linda and Robert Judd  
Jan Postma and David Karp  
Nell Kneibler  
Pat Kuta and Gregory Fearon  
Holly and Stephen Kyle  
Jim Lamb  
Lar Landa and Scott Wright  
Susan Lentz  
Taya Levine

Marcia and Jim Levy  
Charlene and Philip Luks  
Dottie and Bill Lynch  
Kate Ecker and John Mackie  
John Marcucci  
Kay Marquet  
Catherine and David Marsten  
Dr. Monica M. Mastin  
and Dr. Stephen V. Bohn

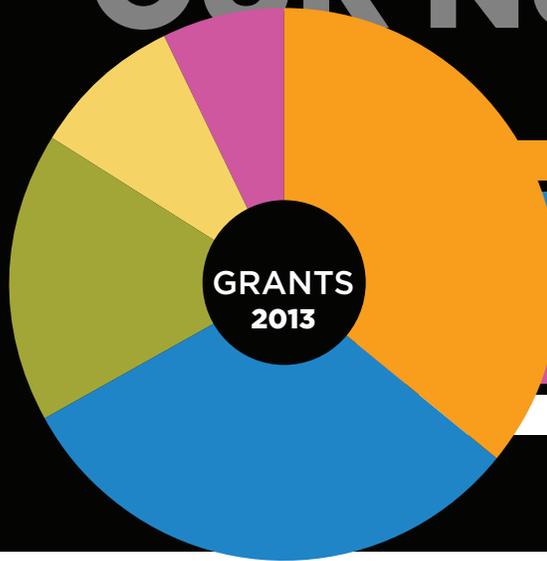
Deborah Matteri  
Diana Mauregard  
Linda Mayberry-Chavez  
and Carlos Chavez  
Helen B. McStravick  
Lannie Medina and Alan Smithwick  
Joyce E. Miller  
Betz and Sam Miller  
Susan Miller

J Mullineaux and Matt Malik  
Eileen and Ron Nelson  
Nadenia Newkirk  
Kathy and Bill Newlands  
Hope and Jack Nisson  
Nancy and Steve Oliver  
Joyce and Steven L. Pease  
Barbara White Perry and Fred Perry  
Rhoann Ponseti

Joyce Remak  
Maril and Harry B. Richardson, Jr.  
Edie and Craig Roland  
Martha and Stephen Rosenblatt  
Joshua Rymer and Timothy Frazer  
Catharine O. and Henry A. Sandbach  
Susanne and Victor F. Sangiacomo  
Lynn and John Schiek  
Kathie Schmid

# OUR NUMBERS

	2013	2012
<b>ASSETS</b>		
Cash and Cash Equivalents	2,996,000	1,426,000
Contributions Receivable	11,622,000	12,068,000
Investments	112,627,000	107,791,000
Charitable Trust Assets	26,714,000	19,638,000
Other	7,462,000	12,594,000
<b>Total Assets</b>	<b>161,421,000</b>	<b>153,517,000</b>
<b>LIABILITIES AND NET ASSETS</b>		
Agency Funds	14,933,000	16,336,000
Other Liabilities	8,979,000	6,707,000
Total Liabilities	23,912,000	23,043,000
Net Assets	137,509,000	130,474,000
<b>Total Liabilities and Net Assets</b>	<b>161,421,000</b>	<b>153,517,000</b>
<b>REVENUE IN DOLLARS</b>		
Contributions	9,320,000	10,392,000
Net Investment Revenue	10,221,000	8,257,000
Other	1,268,200	1,281,000
<b>Total Revenue</b>	<b>20,809,000</b>	<b>19,930,000</b>



36%	HEALTH & HUMAN SERVICES	\$3,788,000
31%	ARTS & CULTURE	\$3,175,000
17%	EDUCATION & SCHOLARSHIPS	\$1,785,000
9%	ENVIRONMENT	\$947,000
7%	OTHER	\$725,000
100%	TOTAL	\$10,420,000

**GRANTS  
2013**

**84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01 02 03 04 05 06 07 08 09 10 11 12 13**

Our first grant purchased a grand piano for the Santa Rosa Symphony that is still in use today.

First designated endowment fund to support KRCB public television.

Established an arts funding program with grant from National Endowment for Arts.

Convened Shelter Solutions, a task force aimed at reducing homelessness.

Chop's Teen Club opens with Charles DeMeo's legacy bequest.

Samuel L. Jones Hall for the homeless opens.

The Oliver Ranch Foundation joins as a supporting organization.

Helped launch the North Bay Climate Adaptation Initiative.

Facilitated merger to form 10,000 Degrees Sonoma County.

## TIMELINE

Bernice Schmitt  
Elizabeth and Russell Schreiber  
Jean Schulz  
Ann Sebastian  
June Silva  
Joan Marler-Smith and Dan Smith  
Daphne Smith  
Doug Smith  
Scott T. Smith and Marcelo Defreitas

Fran and Marvin K. Soiland  
Vicki and David Stollmeyer  
Carol Stout  
Michele and Scott G. Thayer  
Henry Trione  
Robert Tuttle  
Rosa and Francisco Vazquez  
Valerie Walter and Jeffrey Walter  
Cami Weaver

Holly and Henry Wendt  
Christina Barasch  
and Stephen Yingst  
Barbara Young  
Gloria and Jeffrey A. Young  
Gwen Zeller  
Anonymous (16)

Estate of Father Jerald Thomas  
Estate of Lucille K. Baker  
Estate of Donna J. Holloway  
Estate of Hazel and Roland Todd  
Anonymous Estate

## SONOMA VALLEY FUND

Established in 2007, the Sonoma Valley Fund aims to grow and preserve the philanthropic traditions and life quality of its community. The Sonoma Valley Fund seeks to assuage the challenges and increase the opportunities for all.

To that end, this affiliate works with 22 nonprofit partners, helping them to develop endowment and legacy giving programs. The Fund hosted an *Antiques Roadshow*-style event and programming to draw attention to the estate value of collectibles whose proceeds were donated to our local nonprofit partners.

Community Foundation Sonoma County and the Sonoma Valley Fund have awarded more than \$2.7 million in grants and scholarships since the Fund's inception, giving over half a million in 2013. A vigorous bequest campaign has engaged 37 area individuals and families in a planned giving program. The Sonoma Valley Fund provides an important lifeline to its resident community and offers unprecedented opportunities to enjoy an enhanced life for all in this very special corner of Sonoma County.

## HEALDSBURG AREA FUND

Our North County affiliate, serving both Healdsburg and Geyserville, celebrated its first decade in 2013 with a bang, launching the Healdsburg Legacy Challenge in active outreach to citizens interested in doing what Harmon Heald himself did: changing North County for the better.

We're grateful that residents Barbara Grassechi and Tony Crabb, Jane and Herb Dwight, and an anonymous donor have all stepped forward, offering to match 10 percent of all future gift promises made today up to \$100,000. This kind of generosity and investment in North County is among the reasons that the Healdsburg Area Fund is so robust and effective.

Since its inception in 2003, this Community Foundation affiliate has granted some \$433,000 to 33 nonprofit organizations. With a \$1.3 million endowment, the Healdsburg Area Fund gave over \$80,000 to 18 nonprofits in 2013. Such giving showcases what Community Foundations do best, which is to know exactly what the needs of its citizens are and to serve them nimbly.

# sonomacf.org



## SUPPORTING ORGANIZATIONS

### PEPPERWOOD PRESERVE

Educates and engages our community through habitat preservation, science-based conservation, leading-edge research, and interdisciplinary educational programs. In 2013, Pepperwood launched TeenNat, a science internship program for students.

### OLIVER RANCH FOUNDATION

Promotes artistic appreciation for site-specific sculpture and performances. In 2013, the Oliver Ranch Foundation offered 36 tours of the sculpture ranch on behalf of nonprofits to assist them with their fundraising.

### CHOP'S TEEN CLUB

Provides a safe, fun, and productive place where teens engage, connect, and discover their true potential. In 2013, Chop's Teen Club saw a 15 percent growth in participation.

### SONOMA PARADISO

Dedicated to ensuring the health, education, welfare, and quality of life for the children of Sonoma County. In 2013, Sonoma Paradiso made a total of \$80,000 in grants to 19 different organizations.