

YOUR COMMUNITY. YOUR LEGACY.

# SONOMA VALLEY FUND

TAKING CARE OF BOTH.

## DONORS & LEGACY GIFTS

|  |   |
|--|---|
| Jeanne and Chip Allen                  | Jim Lamb                                  |
| Peggy and Russell Bair                 | John & Sandra Leland Foundation           |
| Janet Bosshard                         | Sandra and John Leland                    |
| Libby and John Brady                   | Marcia and Jim Levy                       |
| Karen Collins                          | Marcia and Gary Nelson                    |
| Arleen Curry and Ann Weeks             | Joyce and Steven Pease                    |
| Gemma Gallovich and Theodore J. Cutler | Connie and Bob Peirce                     |
| Harriet and Randy Derwingson           | JaMel and Thomas Perkins                  |
| David E. Donnelley                     | Valerie Pistole and Jeffrey Walter        |
| Sandy and Dick Drew                    | Rathman Family Fund                       |
| Pat and Ted Eliot                      | Karen and George Rathman                  |
| Ellis-Leland Foundation                | Lawrence Robinson                         |
| George and Phyllis Ellman              | Martha and Stephen Rosenblatt             |
| Scott Raymond Evans Foundation         | Catherine and Henry Sandbach              |
| Jeanette and Whitney Evans             | Maggie Salenger Haywood and Peter Haywood |
| Exchange Bank                          | Stollmeyer Family Fund                    |
| Lois Gordon                            | Vicky and David Stollmeyer                |
| Donna and James Halow                  | Pam and John Story                        |
| Tom Haeuser and Antoinette Kuhry       | Barbara Young                             |
| R. Stuart Hummel                       | Community Foundation                      |
| Kiwanis Club of Sonoma Plaza           | Sonoma County                             |
| Margaret and Stephen Kyle              |   |

## SONOMA VALLEY FUND BOARD 2010-2011

|                                       |                   |
|---------------------------------------|-------------------|
| Harriet Derwingson, <i>President</i>  | Susan Cook        |
| Barbara Young, <i>President Elect</i> | Tony Garcia       |
| Tom Haeuser, <i>Secretary</i>         | Steve Pease       |
| Donna Halow, <i>Treasurer</i>         | George Rathman    |
| Whitney Evans, <i>Past President</i>  | Martha Rosenblatt |
| Joe Aaron                             | Joshua Rymer      |
| Peggy Bair                            | Scott Smith       |
| John Brady                            | Dave Stollmeyer   |
| Karen Collins                         | Rick Wynne        |

## SONOMA VALLEY FUND ADVISORS 2010-2011

|                         |                |
|-------------------------|----------------|
| Simon Blattner          | Steve Kyle     |
| Suzanne Brangham        | Jim Lamb       |
| Louann Carlomagno       | John Leland    |
| Arleen Curry            | Marcia Levy    |
| Ted Cutler              | Gary D. Nelson |
| Christine Dohrmann      | Jon Parker     |
| Richard Drew            | Bob Peirce     |
| Theodore Eliot, Jr.     | Hank Sandbach  |
| Robert Erskine          | John Story     |
| Lois Gordon             | Jeffrey Walter |
| Maggie Salenger Haywood |                |

## SONOMA VALLEY FUND GRANTS COMMITTEES 2010-2011

|                       |                    |
|-----------------------|--------------------|
| <b>ELLMAN FUND:</b>   | <b>TODD FUND:</b>  |
| Maggie Salenger       | Loretta Carr       |
| Haywood, <i>Chair</i> | Harriet Derwingson |
| Judith Bjorndal       | Dianne Edwards     |
| Karen Collins         | Ted Eliot          |
| Susan Cook            | Donna Halow        |
| Ethel Daly            | George Rathman     |
| Steve Kyle            | Dave Stollmeyer    |
| Steve Pease           | Barbara Hughes     |
|                       | Robert Judd        |
|                       | Joe Valentine      |

## SONOMA VALLEY FUND NONPROFIT SERVICES INITIATIVE

|   |                  |
|---|------------------|
| Karen Collins and Donna Halow, <i>Co-Chairs</i> | Barbara Hughes   |
| Gary D. Nelson                                  | Suzanne Brangham |
| Steve Pease                                     | Pam Gibson       |
|   | Arlene Curry     |

## SONOMA VALLEY FUND YOUTH INITIATIVE COUNCIL

|   |                  |
|---|------------------|
| Dick Drew, <i>Chair</i>                 | Maite Iturri     |
| Ellen LaBruce, <i>Council Executive</i> | Steve Pease      |
| Karla Conroy                            | Maricarmen Reyes |
| Pilar Cruz                              | Bret Sackett     |
| Camarino Hawing                         | Lez Vadasz       |
|   | Barbara Young    |

## COMMUNITY FOUNDATION SONOMA COUNTY STAFF

|  |   |
|--|---|
| Barbara Hughes, <i>President and CEO</i> | Joe Valentine, <i>Affiliate Relations Officer</i> |
|--|---|



| FUND BALANCES AS OF DECEMBER 31, 2010 (not audited) |                    |
|---|--------------------|
| UNRESTRICTED FUNDS FOR SONOMA VALLEY:               | \$120,591          |
| DONOR-ADVISED FUNDS:                                | \$516,071          |
| NONPROFIT PARTNER FUNDS:                            | \$2,965,863        |
| <b>TOTAL OF ALL FUNDS</b>                           | <b>\$3,602,525</b> |

Revocable Promises to Give (estimated): **\$3,494,400**

*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](http://www.sonomavalleyfund.org)  
[www.sonomacf.org](http://www.sonomacf.org)

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



## Community Initiatives



### A Focus on Youth

Formed at the outset of 2010, the Coordinating Council for Youth Development in Sonoma began its work by assisting grade 4-8 students with activities that enriched their summers. The Council, with the aid of civic organizations, foundations and individuals, enhanced the school district's newly structured summer school by providing support for study trips, expert guest instructors and teen mentors. It also offered over forty local summer activity scholarships for at-risk students.

We give special thanks to the **Rotary Club of Sonoma Valley**, **Exchange Bank**, the **Scott Raymond Evans Foundation**, the **Kiwanis Club of Sonoma Plaza** and a number of individuals for their commitment to youth in Sonoma Valley, and for ensuring the success of the summer programs.

With continued focus on middle school students, the Youth Initiative's coordinator recruited expert instructors and implemented diverse enrichment courses for over 300 students in two 2011 after-school sessions. These programs, developed in coordination with the school district's curriculum, enhance the overall learning experience, with the goal that youth choose to remain in school through graduation and are then ready for college and careers.



### Celebrating Community and Volunteerism

Bouverie Preserve of Audubon Canyon Ranch was the spectacular setting for the Sonoma Valley Funds' annual community celebration. The event attracted more than 200 community members to recognize and honor special volunteers, the 2010 "Sonoma Valley Stars," selected by SVF's Partner organizations. This special group of people demonstrates the true spirit of volunteerism in our community.

*"Never doubt that a small group of committed people can change the world. Indeed, it is the only thing that ever has."*

— Margaret Mead



Sonoma Valley Stars Volunteers Photo: Zanne Clark

## Grant Making in Sonoma Valley

In 2010, Sonoma Valley Fund, with Community Foundation Sonoma County, awarded \$167,380 to the local community in grants and scholarships. Sonoma Valley Fund awarded seven grants from the George and Phyllis Ellman Fund totaling \$30,500 to support a diversity of work.

### 2010 SONOMA VALLEY ELLMAN FUND GRANTS

**AUDUBON CANYON RANCH** – to restore degraded habitats, protect rare and endangered species and conduct the monitoring necessary to ensure that gains in habitat restoration are maintained.

**BLUE WING ADOBE PRESERVATION COMMITTEE** – to produce a coordinated strategy/road map with California State Parks designed to galvanize public interest, complete essential studies, raise funds, and inspire a constituency for stabilization and reuse of this historic building.

### ASSISTING VALLEY NONPROFITS

Led by Sonoma Valley Fund's NonProfit Services Initiative committee, a Stanford Business School pro bono Alumni Consulting Team (ACT) recently completed an analysis of 14 Sonoma Valley nonprofit organizations. The purpose of the study was to determine the feasibility of using pooled purchasing to reduce non-program costs. Through a combination of external research and interviews, the team sought to identify those opportunities with the highest probability for savings. Final recommendations were presented to nonprofit executive directors, board and finance chairs and were based on the potential size of benefit; ease of implementation; and sustainability.

The steering committee and ACT believe that findings could result in significant savings. Using a conservative prediction of 12% to 17%, combined savings could range from between \$265,000 to \$375,000. An implementation team continues to work with Sonoma Valley nonprofits via the Executive Director Roundtable and other one-on-one assistance, and the results of this initiative will be tracked over the next two years.



*"This great project does something that many of us non profit leaders have been too busy to take on – lowers overhead costs by working with other programs. The analysis was helpful and the SVF follow-up work is tailored to fit our specific situations. Some of what they found is so simple... I can't believe we weren't doing it already. Hopefully, this is the start of a collaboration, whereby we all can benefit from the experience and connections that SVF brings to our community."*

— Richard Dale, Executive Director, Sonoma Ecology Center

*"This initiative will reduce costs, facilitate collaboration, and hopefully lead to consolidation of nonprofit efforts."*

— Gary Nelson, Nelson Personnel

## Building Legacies

SONOMA VALLEY FUND'S unique role in our community as an affiliate of Community Foundation Sonoma County is designed to take advantage of the Community Foundation's sound investment management of donor funds and the gift planning expertise of its staff. Community Foundation Sonoma County has operated for 28 years and currently manages nearly \$150 million in assets.

During its initial three years, the SVF has put in place an outstanding Board and Advisor Team comprised of community leaders; partnered with 15 nonprofits to develop endowment and legacy programs; and sponsored educational forums. SVF's legacy program promises to exceed \$3 million, and funds invested for our fifteen nonprofit Partners exceed \$2 million.

### SONOMA VALLEY FUND PARTNERS

An important part of our mission is to support our Partners and other Valley nonprofits in their development of endowment and legacy programs. The goal is to build a secure source of funds in the future so that the important services and good work in our community can continue.

*"I have been a supporter of endowment giving for many years and serve on the Endowment Committee of the Boys & Girls Clubs of Sonoma Valley. I am proud of the success of the committee and the 17 members of our Heritage Circle who have made endowment gifts or pledges. During 2010 a legacy gift of \$100,000 was received."*

— Helen Fernandez

*"Museums are places to let go of the everyday and let the imagination soar. If a single child comes into an exhibit and becomes inspired to come back again — or to value his or her own artistic senses — then we are doing something monumental. So it is with our Sonoma Valley Museum of Art. We want this place to be here for future generations — a small, but "smart" museum with the real intention and ability to inspire. What better way to make that happen than to partner with the Sonoma Valley Fund and join the SVMA Legacy Society?"*

— Gerry Snedaker, Diane Krause, Kimberly and Simon Blattner

### Our Partners

|  | Since | 2010 |
|--|-------|------|
| Becoming Independent                       | 2007  |      |
| Boys & Girls Clubs of Sonoma Valley        | 2009  |      |
| Hanna Boys Center                          | 2008  |      |
| Gary and Marcia Nelson Emergency Care Fund | 2009  |      |
| La Luz Center                              | 2009  |      |
| Pets Lifeline                              | 2009  |      |
| Quarryhill Botanical Garden                | 2010  |      |
| Sonoma Ecology Center                      | 2008  |      |
| Sonoma League for Historic Preservation    | 2008  |      |
| Sonoma Valley Education Foundation         | 2008  |      |
| Sonoma Valley Hospital Foundation          | 2009  |      |
| Sonoma Valley Mentoring Alliance           | 2007  |      |
| Sonoma Valley Museum of Art                | 2008  |      |
| Sonoma Valley Teen Services                | 2007  |      |
| Vintage House                              |       | 2007 |

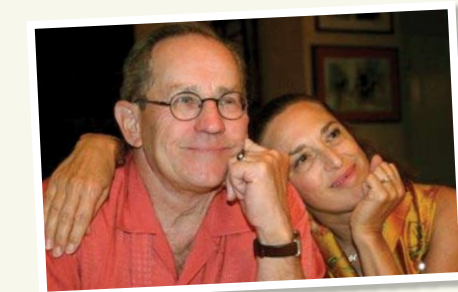
### LEGACY DONORS

*"The Sonoma Valley Fund is an important part of our estate plan. At the end of our lifetime, we will leave a percent of our assets to several Sonoma Valley nonprofits that are important to us. We have specified uses like new programs or capital campaigns. The SVF will monitor the use of these funds to be sure our wishes are carried out. We will also leave a percent to the SVF for use where the Board sees the greatest needs in our beloved valley."*

— Jeanette and Whitney Evans

*"We decided to make a Legacy gift because assisting the Sonoma Valley Fund in its important work in our own neighborhood is a high priority for us."*

— Ted and Pat Eliot



**LANDPATHS** – to support Flowery Elementary School's 3rd grade program, In Our Own Backyard, which connects students in the Valley through field-based activities and a grassland restoration project while supporting broader education needs.

**SONOMA COMMUNITY CENTER** – to support the installation of a 5,800-gallon rainwater harvesting system to reduce water pollution in Nathanson Creek and educate the community on water supply issues and landscaping alternatives.

**SONOMA ECOLOGY CENTER** – to support the K-12 Watershed Education Project which delivers environmental content and outdoor experiences for over 1,000 students per year in 8 – 15 hour modules held in classrooms and field locations.

**SONOMA LAND TRUST** – to create two scenic overlooks along the Loop Trail at the Glen Oaks Ranch and to increase awareness of the natural resources of Sonoma Valley and promote greater appreciation of local conservation efforts.

**SONOMA CLASSICAL MUSIC SOCIETY** – to support the work of the Sonoma Classical Music Society.