The Arc of Giving Creates Bridges that Strengthen and Sustain Our community.

Some people give.
Some people receive.
Some people serve.
We all work together.
CREATING BRIDGES IN OUR COMMUNITY FOR 25 YEARS

Bridges serve in ways grand and small, **CONNECTING** us to each other, transporting us to new places, lifting us above rapid currents, providing safe passage. Good bridges are **BUILT TO LAST**, integrating durability, flexibility and resilience. Some are merely metaphorical or poetic in nature. Others are present in life’s details, giving resonance to the violin string or propping up our eyeglasses. Whether or not we notice, **BRIDGES QUIETLY SERVE**, making access possible, journeys shorter and providing new vistas along the way.

Similarly, for 25 years, Community Foundation Sonoma County has been creating bridges of many kinds, **LINKING** donors with nonprofit organizations that steadily work to improve life for all.

**ENGAGED PHILANTHROPY** is what we wish to showcase. A few of our donors share why they give and how they translate this into action. The **ARC OF GIVING** connects us all. It spans generations, crosses boundaries, provides access to possibilities and unites us in our concerns and passions.

Twenty-five years ago, an extraordinary group of **VISIONARIES** saw potential and created an institution that has attracted more and more **GENEROSITY**, making our Community Foundation what it is today: a **RELIABLE PRESENCE** supporting the greater good, a convening agent for positive change and a permanent **BRIDGE** to a sustainable future.
Poetry is a bridge into a child’s imagination, giving us a peek into the rich potential and creative power of young minds. Poems from the California Poets in the Schools program grace these pages and illustrate the alchemy of teachers who encourage their students to see life and the world in a transcendent way.

The photo below is from an exercise called “Black & White” where historical photos were used to stimulate children’s empathy for what it feels like to be different, excluded, and ostracized versus what it could be like to feel welcomed, trusted and befriended. The poignant emotions, abstract thoughts and keen observations in all the poems included here tell us that everywhere, in the everyday, poems are waiting to be imagined.
Dear Friends,

Spanning 25 years, the arc of giving through Community Foundation Sonoma County has grown, linking donors to needs and opportunities, ideas to action and making our community a stronger, more inclusive and vibrant place to live. Our first grant in 1983 – a Hamburg Steinway grand piano – is still used by the Santa Rosa Symphony and continues to bring the gift of beautiful music to thousands of people.

As we go to press, grants made through the Community Foundation have reached a cumulative $100 million, reflecting the strong local commitment to improve and enrich community life. Our assets are currently valued at $150 million, 45% of which is permanently invested to grow the giving power of our endowment. In 2007, the Community Foundation and its donor advisors gave out $14.7 million in grants.

This report celebrates our first 25 years, highlighting not only the programs and donors with a long history of partnership with us, but also innovators trying out new models as well. What changes will another 25, 50 or 100 years bring to Sonoma County? Anchored in the strength of our first quarter century, the Community Foundation will continue to play an active role in shaping the future of our county. How can you be a dynamic force for good? What bridges can you create in making our hometowns healthy and vibrant? What will your legacy be in this community? We invite you to join the Community Foundation in creating strong, inventive and sustainable solutions bridging today and tomorrow for generations to come.

Kay M. Marquet
KAY M. MARQUET, PRESIDENT AND CEO

Barbara Graves
BARBARA GRAVES, BOARD CHAIR

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Albert Handelman, Past Chair, Kay Marquet, President & CEO, Barbara Graves, Chair

(707) 579-4073  www.sonomacf.org
My Imagination

My imagination is wild as a summer
in a galaxy of smoky dreams
flaming through the sky.

My imagination is untamed as an idea
rising through the stars
getting more and more powerful each minute.

My imagination is as simple as
a burning dream.

Pedro Cardona
6th grade, Cali Calmelcach Charter School, Windsor
ELEVATING ART

GRANT HIGHLIGHTS:

2008

Artists
Julie Cavaz
Sarah Frieberg
and Gerroid Van Dyke
were recently awarded the second round of Emerging Artist Awards.
Their $5,000 prizes offer critical practical support coupled with encouragement, art-world introductions and priceless public exposure. All three are featured at a sneak preview in Healdsburg, a major show at the Sonoma County Museum and a special exhibit at the Sonoma Valley Museum of Art this year.

GRANT HISTORY: Before receiving one of the three Emerging Artists Awards in 2006, Seth Minor funded his art by operating heavy machinery and climbing — trees, rock walls and turbine windmills. Resulting exhibitions of his figurative wire sculpture attracted sales, increased demand and secured him gallery representation. He will soon install a large-scale wire commission on a public building, where the figures will cast giant lines and shadows onto downtown Santa Rosa. With hopes of replicating this in other cities, Seth’s sights are higher than ever.

2006

GRANT HISTORY: In 1989, a matching grant from the National Endowment for the Arts assisted the Community Foundation in building its endowed Fund for the Arts for Sonoma County. For Ginny Stanford, one of the first artists to be supported by a Community Foundation grant in 1990, this meant moving from a live-work room, where she crawled under large paintings to reach the sink, to a professional studio, where her portraiture could flourish. Opportunity knocked with a commission from MFK Fisher; and later, Hillary Clinton, both of whose paintings are now in the Smithsonian National Portrait Gallery.

1989

Reflecting the spirit of the early National Endowment for the Arts-initiated awards, the current SonomaArts Awards for Emerging Artists are given to accomplished working artists, providing them the lift that could propel their careers and solidify their reputations. At the center of these efforts is a strategic partnership between the Arts Council of Sonoma County and the Community Foundation.

Plans are in the works to expand these awards to include the literary and performing arts, in an effort to acknowledge and promote the many forms of cultural riches that vitalize our community.

(707) 579-4073 www.sonomacf.org
My Dreams

My dreams are the wind
that comes home like a bird
in the beautiful night.

My heart is a red rose
flying in the light blue sky
like a cloud moving slow
spreading out my feeling and all love.

Maria Jimenez,
6th grade, Cali Calmécac Charter School, Windsor
“Most people have to be taught about stewardship and philanthropy,” says Jeannie Schulz. “To go beyond the instinctual part of giving takes thoughtful effort.” Like her passion for trapeze, Jeannie’s philanthropy is daring and bold. She’s excited about young people who bring a new spirit to civic engagement by using the nonprofit arena as a place for creative change. “I’m aware that by being on a board, I’m not in the trenches. I’m very grateful for those who are doing it, because they are the bridge for me to touch others.”

**BOLDLY REACHING OUT**

**FOUNDER PROFILE:** “There’s never enough money to solve all the current pressing community needs,” says **Jeannie Schulz**, founding board member who helped design the blueprint of the Community Foundation. “In the early days, the board focused on creating an unrestricted endowment; we did everything we could to encourage a wide donor base.”

Jeannie credits the 1995 Charles DeMeo gift for much of the growth and visibility of the young Community Foundation, along with funds from the National Endowment for the Arts (1989-1992), which matched money raised locally. She utilizes the professional staff whose community knowledge and diligence helps her judge the best places to put her contributions.
I Know...

You and I are the reflection of peace.
I know you see the real me and not my color.
We smile when there’s no yelling; we talk
to each other.

I know we form a perfect colored frame
where happiness spreads around the cold, grayish room.
I know you’ll always hold my hand and be my friend.
No one can tell us that we’re different
from each other.

We will always hold hands wherever we go.
I know I am not lonely and afraid anymore
because I’ve got you by my side.

Ali Soto
6th grade, Lincoln Elementary School, Santa Rosa
SEEDING THE FUTURE

DONOR PROFILE: “We love to foster stewardship and to help create community,” say Gordon and Cora Stewart. They opened their Acorn Fund ten years ago, a donor-advised fund that has been pivotal in growing several innovative programs, including the new Bayer Farm in Roseland.

An initial seed grant to LandPaths laid the groundwork for the startup garden and local outreach; their accompanying challenge grant doubled the funds. As Bayer Farm took hold, the Stewarts leveraged contributions through the Community Foundation’s Partners in Philanthropy program which greatly expanded the project’s infrastructure.

CREATING BRIDGES: Besides serving with LandPaths, Gordon sits on the boards of KRCB and the Santa Rosa Bicycle Club. Cora is developing a prototype to produce 1000 quilted wheelchair bags for the Veterans Home in Yountville. They both have boundless energy and their personal philanthropy is about sowing new ways to connect people to nature and to one another.

FUSING URBAN AND RURAL

GRANT HIGHLIGHTS: With a history of connecting people to the land through public access and property stewardship, LandPaths recently opened a new kind of portal for alleviating our “nature deficit disorder.” When they took on Bayer Farm in the middle of Roseland, they asked, “Why aren’t we growing food on our parklands?” Their expanded vision combines the benefits of a rural farm and urban park. The six acres now provide needed green space, abundant food gardens, nature-based youth programs and an outdoor place for community celebrations.

Cultivated with donor-advised funds from the Community Foundation, the farm broke ground in August 2007. Door-to-door neighborhood outreach by Project Coordinator Magdalena Ridley (a native of Roseland) sparked enthusiastic interest and familial volunteering. Local kids took to it and Community Action Partnership’s YouthBuild trainees pitched in to help with planting. Showing off an amazing October harvest, a widely-attended fall fiesta celebrated the creation of a new kind of Roseland gathering place.

Think of victory gardens and community-building, of having bilingual interpreters at meetings so that everyone feels included. Imagine neighbors streaming through streets, drawn to the aromas of garden vegetable quesadillas and the music of multi-cultural dances on a hay bale stage. Envision a walk-to summer camp, farm animals and “dirt mentoring” for youth. Bayer Farm is modeling an approach to healthier urban neighborhoods where “no child is left inside.”
Para Entenderme

Para entenderme
you have to speak
la armonía of forgiveness.

Para entenderme
you have to listen
to el ritmo of a morning breeze.

Para entenderme
you have to feel
la calma of a steady green turtle.

Para entenderme
you have to dance
to la canción that traps
the humming birds.

Para entenderme
you have to sing
to la melodía below a sunset
of beautiful, gleaming light.

Para entenderme
you have to touch
el sueño of a tear
falling down your cheek.

Para entenderme
you have to go far,
far from everyone else.

Para entenderme
you have to go
through obstacles.

Irma Olvera
6th grade, Burbank Elementary School, Santa Rosa
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Para entenderme you have to feel la calma of a steady green turtle.

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Para entenderme you have to go far, far from everyone else.

Irma Olvera
6th grade, Burbank Elementary School, Santa Rosa

Roseland University Prep (RUP) students get teased about “going to school in a box.” The walls of their converted-warehouse campus pulse purple and various university banners wave from the ceiling, reflecting students’ aspirations. They retort proudly, “Who’s going to college?” The Class of 2008, RUP’s first, includes 18 Latino males, rivaling the total from Santa Rosa’s other five traditional public high schools combined.

LIFTING ASPIRATIONS

ORGANIZATION PROFILE: Roseland School District Superintendent Gail Ahlas and Principal Amy Jones-Kerr co-founded Roseland University Prep to meet parents’ requests for a college-focused curriculum. Their vision of making college not only a possibility but a probability is reflected in the remarkable 97% graduation rate. RUP has two funds at the Community Foundation: an organization fund and its scholarship fund. Many 2008 graduates will receive college aid through RUP and other Community Foundation scholarships.

When RuP students proudly lead campus tours, they describe how high academic standards, strict, yet big-hearted discipline, encouragement from the President of Sonoma State University and an actual college dorm stay prepare them for higher education. They speak about the value of “adult time” with teachers and how they hope to return to mentor younger students. Their aspirations clearly paint visions for a brighter future. This innovative public charter school is raising its own aspirations even higher with dreams of a new building, soccer field, more counselors, fundraising assistance and additional mentoring volunteers.

CREATING BRIDGES: In Mexico, national television and newspapers celebrate the arrival of Healdsburg teachers, whose lessons enrich local curriculum. MEP teachers trade information with their Michoacán colleagues, learn new techniques in interactive education and experience Mexican culture. “To see the vibrant mix was an awakening,” says Lauren, “a whole dimension that was missing.” As a resource for other teachers and migrant parents, she brings her expanded awareness back to Sonoma County.

GRANT HIGHLIGHTS: In American schools, if children sell tacos at lunch, they might be considered a discipline problem. In Mexico, where recess is unsupervised and micro-businesses flourish, this behavior is normal. This was an “aha! moment” for participants in the Migrant Education Program's (MEP) teacher exchange to Michoacán. By staying with families and teaching in Mexican classrooms, they gained a deeper understanding of the cultural differences that challenge migrant students. Healdsburg educator Lauren Rockstad says, “I feel like an ambassador – I’m now willing to speak up for my immigrant students.”

Funded for three years by a Healdsburg Area Fund grant, this local Migrant Education Program is the brainchild of Elaine Pearson, Isabel Quinonez and Rosa Villalpando. A separate, federally-funded program brings teachers from Michoacán and Jalisco to Healdsburg and supports migrant education through instructional, health and translation services. The Sonoma County/Michoacán project complements this exchange in reverse.

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Across the Best Bridge Yet

Days and stardust nights pass by.
I wonder to myself will we ever meet?
I have never heard you
but I feel your presence in my atmosphere.

Among the trees and the whimsical sky we will meet. Across the beat of the coastlight bridge.

Korin Robles
6th grade, Burbank Elementary School, Santa Rosa
SPANNING GENERATIONS

DONOR PROFILE: “We were poor but never went hungry,” says Harry Friedman, who grew up in Sonoma County. “Someone was always poorer, so we would give. I went to school with worn-out shoes and envied what others had. When I was ten, my mother said, ‘Someday you will get more pleasure from giving than from getting.’” That message stuck with Harry for 70 years and was amplified through his vast family and work relationships. “Friedman Brothers is successful because of how we treat people,” he explains, “We give of ourselves. Real giving is unconditional.”

Harry was an early board member of the Community Foundation and chaired the Distribution Committee. Over the years, he has supported numerous civic projects. “Experience is a tough teacher,” Harry says, “It gives you the test first and the lessons afterwards. I learned that if one of us does something wrong, we are all responsible.”

CREATING BRIDGES: Because he feels education is of greatest importance, Harry has sent all of his children and grandchildren through college. After recently opening a youth-advised fund at the Community Foundation for his new great-grand-nephew Macklin David Friedman, Harry says, “I can never do enough.” As Harry’s mother predicted, his pleasure is magnified when giving others the opportunity to give.

“As we acquire more properties and conservation easements, we increase our obligation to provide exemplary stewardship,” says Ralph Benson, Executive Director of Sonoma Land Trust. “Cities are emphasizing infill development. We’ve funded Agricultural Preservation and an Open Space District. We’re protecting the coastline and the countryside. Sonoma County has done it right.”

WEAVING TOGETHER PROTECTED PLACES

ORGANIZATION HISTORY:
Sonoma Land Trust, like the Community Foundation, has experienced steady growth over the past 25 years. People here treasure the rural landscape and regard it as theatre for community life. “We have protected over 19,000 acres of scenic, natural, agricultural and open land,” says Ralph Benson. “Now we can concentrate on weaving together this tapestry of protected places.”

Sonoma Land Trust receives money through the Community Foundation from multiple sources: an endowment fund helps maintain its historic Glen Oaks Ranch in Glen Ellen, discretionary grants have paid for conservation planning and critical acquisition gifts have come from individual donor-advised funds. The Land Trust invests its own Stewardship Fund with the Community Foundation. And like its partner, Sonoma Land Trust focuses on permanence and perpetuity. Forever.
Going to Guadalajara, Mexico

I wear a sombrero coming down the street, dancing and going to Guadalajara, Mexico. My sombrero has the colors of the Mexican flag. My sombrero has diamonds on it. They’re silver. I’m going to Guadalajara, Mexico, to eat my grandma’s good tamales. I like them. Me gustan. I am singing a song to my grandma, in front of her, like a mariachi.

Hector Perez, 5th Grade, Monroe Elementary School, Santa Rosa
**DONOR PROFILE:** While visiting from Seattle, Barbara and Howard Wollner fell in love with Sonoma County and bought a home in Healdsburg. “We’re here part-time, but it’s not a vacation home. For us, it’s real community,” explains Howard. “Community Foundations do a great job of uncovering giving opportunities, so we sought out the local one upon moving here,” says Barbara. With civic engagement in their blood, Barbara builds networks of people that make things happen while Howard helps organizations with strategic and transition planning.

Howard serves on the board of the Seattle Foundation, where their donor-advised fund, similar to their Kismet Fund here, focuses on the environment, education, social services and the arts. An artist herself, Barbara lights up when talking about the children served by the Imagine Bus Project North, a mobile arts program in Healdsburg which they support. Howard adds, “We both grew up knowing the value of helping others, giving not only money, but time. Once, when we saw a problem in an organization, we scaled back our gift, explaining our concerns to the director. When the problems were corrected, we resumed our giving.”

**CREATING BRIDGES:** The Wollners bring enthusiasm and teamwork to the Healdsburg Area Affiliate. They’ve also taken this concept of geographically-focused affiliates back to Seattle. Flying between two homes, cross-pollinating two communities with their ideas, passion and generosity, Howard and Barbara are active agents for positive change.

**CROSSING BORDERS**

**GRANT HIGHLIGHTS:** In a darkened theater, silhouettes traverse the stage lit by a projection of a desert landscape. Sounds of English and Spanish voices blend with helicopters and mariachi bands. A barbed-wire barrier appears and disappears. Scripted from the tears and laughter of volunteer participants, The Divide/La División, a theatrical piece by the Imaginists, boldly portrays real border-crossing experiences of immigrants living in Sonoma County.

In 2007, twelve groups were invited to address the theme of Crossing Borders for Performance Sonoma, a county-wide arts festival. The Community Foundation grant enabled Imaginists’ directors Brent Lindsay and Amy Pinto to reach out and inventively engage non-actors for their bilingual, community-based production. The Healdsburg performances attracted unprecedented Latino and Anglo audiences and ignited intense dialogue.

**CREATING BRIDGES:** “Artistically, we burst through the stratosphere,” says Brent. “In terms of audience-building, we definitely attracted new eyes.” The Imaginists are expanding the vision of their 20-year-old collaborative organization. They see other community-based projects — a bilingual company, more partnerships with schools, programs for youth who take roads less traveled — and engaging new supporters passionate about the power of art to change lives. They hope to instill a cultural and aesthetic sense of local pride through theater that crosses borders, embraces diversity and promotes understanding.

**ARCING BETWEEN COMMUNITIES**

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My Lovely Sweater

A sweater woven from a loved one
so when I wear it, I know it’s full of love.
Whenever I get very cold,
I wear it around me so I can still feel the love.
Whenever I’m lost, I feel safe
with my sweater.
And I know that I won’t worry in the dark.
If I went into a black cave, my sweater
would be warm enough that it would shine
from the love.
It’s as if it would shine all around me.
Fed just from the love of the sweater.

Juan Cabrera
6th grade, Monroe Elementary School, Santa Rosa
TOUCHING YOUTH

**DONOR PROFILE: Julia Grant** sits at her loom, surrounded by colorful threads and handweavings. “I have a knack for putting unusual colors together,” she says. Her artistry brightens the lives of children at the Valley of the Moon Center. “These kids have been abused and then taken from their families. The blankets I weave for them are one of their only possessions, and it’s theirs forever. I’m interested in feeding the hungry, providing shelter for the homeless and supporting programs for our youth. It’s about survival.”

Julia, who has a kitchen named in her honor at Sloan House Emergency Shelter, contributes generously to dozens of local organizations. “The Community Foundation serves as a bridge to simplify my giving. I’m thrilled and comforted to know it will continue after my lifetime through their planned giving program.”

**CREATING BRIDGES:** By accessing the Community Foundation’s knowledge of local community-benefit organizations, Julia has become a savvy donor in contact regularly with her grantees. She participates in the Partners in Philanthropy program, staying informed of giving opportunities that fall outside the scope or capacity of the Foundation’s discretionary grants. Through her investment in issues facing young people, her philanthropy weaves together strands of hope far into the future.

In 1991, KRCB started Sonoma County’s only classical radio station with help from the Community Foundation and its donor advisors. New radio listeners, exposed to classical music, began to attend Santa Rosa Symphony performances, which KRCB/FM now broadcasts. “This is only one example of our interactions with local organizations which is a great win for all of us,” says Nancy Dobbs, President and CEO of KRCB television and radio.

**TRANSMITTING SUCCESS**

**ORGANIZATION HISTORY:** “We’re celebrating our 25th anniversary next year, so in a sense, we grew up with the Community Foundation,” says Nancy Dobbs. “From the beginning, they took us seriously. As a result, the community took us seriously too. We’re able to partner with diverse groups to address educational, civic and cultural issues. As people become engaged, they become less isolated, more informed and more empowered.”

In addition to receiving ongoing support through donor-advised funds and an early capacity grant from the Community Foundation, the public broadcasting station also benefited from an innovative loan which allowed KRCB to borrow from its own endowment fund and use the station’s antenna as collateral. Reflecting on the benefits of collaborative partnering, Nancy says, “We are a community and we care about one another. Just as a rising tide raises all the boats, we can build upon the successes of one another.”
SUPPORTING ORGANIZATIONS

A Supporting Organization is a separate community benefit corporation that operates under the Community Foundation’s charitable umbrella. It has its own board (on which donors may choose to serve), investment policies, grant priorities and charitable status. Its grantmaking and activities fulfill and support the charitable purposes of the Community Foundation which manages the investments and administers the start-up costs, grants and financial reporting.

DeMeo Teen Club, Inc.
WWW.CHOPSONLINE.COM

In 1995, when former Santa Rosa Mayor Charles “Chop” DeMeo chose to leave his $16 million estate for the benefit of Sonoma County teens and homeless mothers, he knew he would be creating a bridge to the future. His legacy, the DeMeo Teen Club, a supporting organization of Community Foundation Sonoma County, is a perfect example of creating something of lasting value that spans generations.

Linking with other organizations, neighbors, community partners and Santa Rosa schools, Chop’s hosts numerous events and activities, including school dances, conferences, birthday parties, graduation dinners, sport practices and educational convenings. The 21,000-square foot center is home to a recording studio, gym, café, night club, tech lounge and art studio, and supports a plethora of activities and programs designed to attract and engage youth.

Pepperwood Preserve
WWW.PEPPERWOODPRESERVE.ORG

Pepperwood Preserve, a 3000 plus-acre zone of stunning landscape and rich biodiversity in Sonoma County, is the legacy established by Herb and Jane Dwight to protect wild land and foster natural history education, environmental research and preservation.

A 10,000-square foot laboratory and classroom facility entered the planning stage in early 2006 and is expected to open in 2009. It also hosts two astronomical observatories operated with the California Academy of Science and Sonoma State University.

Educational programs through Santa Rosa Junior College offer a wide variety of courses, workshops and field trips on natural history, botany, zoology, natural resource management, anthropology and astronomy. These enrichment programs create bridges for diverse groups — from elementary school students to senior citizens, from urban dwellers to ranchers — to access the beauty of our wilderness and to develop an understanding of the precious resources it holds.
Community-based affiliate organizations are the perfect bridge to bring the services and resources of the Community Foundation into localized, geographic areas of Sonoma County. Each affiliate operates in a specific sub-area, with board members and donors from that community. Each has its own discretionary grantmaking program and develops its own presence in the area served. Affiliates benefit from the broad resources of the Community Foundation, including a comprehensive investment program, professional staff services, grantmaking expertise, legal knowledge and administrative support.

HEALDSBURG AREA FUND

To complement its grantmaking program, the Healdsburg/Geyerville Area Affiliate initiated a series of training workshops for local community benefit organizations designed to strengthen their work. These discussions improved organizational skills and increased dialogue among nonprofit leaders, staff and board members, fostering new linkages and cross-community exchanges.

SONOMA VALLEY FUND

In its first full year of operation, the Sonoma Valley Fund celebrated many successes. According to Board President Whitney Evans, "The community response to the benefits of having a Fund whose goal is to support Sonoma Valley nonprofits through the creation of a permanent endowment has far exceeded our expectations." In 2007, pledges for Legacy gifts climbed to more than $4.9 million and the competitive grants program awarded $23,000. Several community benefit organizations chose to partner with the Sonoma Valley Fund by placing their investment funds under the management of the Community Foundation. They include the Boys & Girls Club Valley of the Moon, Vintage House and the Sonoma Valley Museum of Art.

www.sonomavalleyfund.org
There are many ways to become part of the Community Foundation and make a lasting contribution to our community.

1. Establish your own fund (anonymously or in a name of your choice) with a gift of $10,000 or more;

2. Contribute any amount to our Endowment Funds—for the area of greatest need or to a field of interest (arts, education, environment or health/human services);

3. Establish a donor-advised fund to earn an immediate tax deduction and then spread your giving (through grants) over time;

4. Teach your children or grandchildren the joy of philanthropy by setting up a youth-advised fund with a gift of $1,000 or more;

5. Help a nonprofit organization you are involved with to establish an organizational endowment fund that will support it forever;

6. Establish a scholarship fund with a gift of $25,000 or more;

7. Include a bequest or other planned gift in your estate plan to support a thriving, healthy community for years to come.

**DONOR PROFILE:** Helen McStravick’s commitment to caring for those in need is not only implemented currently through her fund with Community Foundation Sonoma County, but will span beyond her lifetime. Her legacy planning will extend the reach and impact of these gifts well into the future.

As a girl growing up in the 1920s with an Irish Catholic mother, Helen was drawn to the Church and a life of service to others. In the early 1950s, she became a nun, went on to receive a masters degree and spent the next fifteen years in Honolulu working with pregnant teenagers and orphans.

By 1970, her beliefs had shifted away from some core Catholic teachings. “I just couldn’t say divorce and birth control were wrong,” she says. Helen made the difficult decision to leave the Church. She moved to San Francisco and began working at a mental rehabilitation center. She rekindled a friendship with a high school classmate and fell in love with her friend’s brother, Harry McStravick. Harry’s connection to her past made their marriage fuller and more wonderful and his passion for improving the lives of the homeless and mentally ill dovetailed perfectly with her life’s work.

Harry’s youngest daughter had been diagnosed with paranoid schizophrenia and still lives with a severe—and so far incurable—mental illness. With this challenging issue hitting close to home, Helen and Harry focused their giving through a donor-advised fund, the Harry P. and Helen B. McStravick Fund for the Homeless.

**WE ACCEPT A WIDE VARIETY OF GIFTS INCLUDING:**

- Cash
- Publicly-traded securities
- IRAs or life insurance
- Remainder of a Charitable Remainder Trust
- Remainder of a Pooled Income Fund
- Lead gift of a Charitable Lead Trust
- Real estate
- Closely-held and pre-IPO stock

To discuss opening a fund, please contact J Mullineaux, Vice President for Development, at 579-4073, ext. 20.
Creating Bridges: Since Harry’s death in 2001, Helen continues to make grants from their donor-advised fund to support mentally ill homeless people in Sonoma County, and she will leave the remainder of their estate to do the same. “It’s a gift to myself,” she says, “and a way of continuing to honor Harry’s wishes.” Our community will continue to benefit from the McStravick’s generous legacy.

Our Legacy Society was created to recognize those who have chosen the Community Foundation to provide long-term stewardship of their charitable wishes. Please contact Celia Bolam, Planned Giving Officer, at 579-4073, ext. 23 for more information.

Types of Funds You Can Create

Starting with your personal philanthropic goals, any number of funds may be opened. These funds offer a range of flexibility and can memorialize an individual or family. Various options may provide current tax and estate planning benefits.

Endowment Funds

Unrestricted: This option is for donors who wish to support specific areas as identified by the Board of Directors for competitive grants. This is one of the most powerful ways to make a future difference by using the Community Foundation’s experience and knowledge to assess and meet the evolving needs of Sonoma County.

Field of Interest: The earnings payout is directed to projects or programs within our broad funding areas or to your areas of interest.

Scholarship: This choice helps students pay for higher education using criteria established by you.

Additional Types of Funds

Donor-Advised: You, your family or group can participate in the grantmaking process without the administrative details of a private foundation. Corporate funds simplify business giving and gain tax advantages. We manage the logistics and can assist with your grant decisions.

Organization: This creates a permanent pool of assets for your chosen nonprofit organization. You save time and gain expertise by having the Community Foundation manage the fund. Interest payouts provide secure funding into the future.

Supporting Organization: This attractive alternative to a private foundation offers superior tax benefits. As a separate 501(c)(3) operating inside the Community Foundation, you can serve on the board and appoint others, name the fund, direct its mission, determine investment strategy, propose grants and review requests.

For more information, call J Mullineaux, Vice President for Development, at 579-4073, ext. 20.
OFFICERS & BOARD OF DIRECTORS

BARBARA GRAVES
Chair
Director, Prevention & Planning Division, Sonoma County Department of Health Services

JAY ABBE
Retired President and CEO JDS Uniphase

LEW REID
Retired Director and CEO The California Endowment

ALBERT HANDELMAN
Secretary
Attorney

BARBARA BANKE
Co-Proprietor & Vice Chair, Kendall-Jackson Wine Estates

HARRY RICHARDSON, M.D.
Retired Physician

LINDA KACHIU, CPA
Treasurer
Director, Zanier Rinehart Clarke

BENNY L. BRAY
Agency Director State Farm Insurance

WANDA TAPIA-THOMSEN
Program Manager Food Stamp Nutrition Education Program, University of California Cooperative Extension

DIANNE EDWARDS
Retired, Director Sonoma County Human Services

FRANCISCO H. VÁZQUEZ, PH.D.
Director, Hutchins School of Liberal Studies Sonoma State University

DAVID VOSS
Chair Elect
Vice President, Exchange Bank

THEODORE L. ELIOT, JR.
Retired U.S. Foreign Service Officer

CULLEN WILLIAMSON
President and CEO Mary’s Pizza Shack

JEAN SCHULZ
Director Emeritus
President, Charles M. Schulz Museum & Research Center

PETE GOLIS
Retired Editorial Director The Press Democrat

JUDY WITHEE, CFP
Registered Principal Protected Investors of America

ANDREA LEARNED
Vice President for Development, St. Joseph Health System, Sonoma County

JOAN C. WOODARD
President & CEO Simons & Woodard, Inc.
INVESTMENT ADVISORY COMMITTEE
Local professional volunteers meet six times a year to guide our investment policies and monitor investment performance. The Committee’s work is essential to ensure that our well-managed portfolio will produce an ever-increasing income stream for the long-term benefit of the people of Sonoma County.

Judy Withee, CFP, Chair
Protected Investors of America

Sharon Bard
Community Leader

Christopher M. Dobson, CFP
Dobson Asset Management

Bruce Dzieza, CFP
President, Willow Creek Financial Services

J. Barrie Graham
President & CEO, Exchange Bank

Patrick Kilkenney
Kilkenney Advisors

Irwin S. Rothenberg, CPA, PFS
Wealth Management Consultants

Scott G. Thayer, CIMA
Institutional Consulting Director
Director of Investments, Citigroup Institutional Consulting

LEADERSHIP COUNCIL
Former board members.

Jeanette Anglin
Ruben Armillana
Dante Benedetti
Marcus Benedetti
Jeanne Buckley
Mary Caldwell
Lee Chandler
Connie Coddington
Mary Colhoun
Harrison Comstock
Dan Condon
Brad DeMeo
Chris Dobson
Herb Dwight
Paul Elliott
Harry Friedman
J. Barrie Graham
Judith L. Jordan

Mark Matthews
Deborah Meekins
John R. O’Brien
Rhoann Ponsenti
C. William Reinking
Dee Richardson
John H. C. Riley
Irwin S. Rothenberg
Ernie Shelton
Andrew Shepard
Paula Thomas
Victor Trione
Nevia Turner
Kirk Veale
Barbara Walter
Reuben Weinzevug
Mike H. Welty
Henry Wendt III

GRANT DISTRIBUTION COMMITTEE
Reviews and recommends grantmaking programs, budgets and policies. Evaluates all competitive grants over $5,000.

Dianne Edwards, Chair
Benny L. Bray
Harriet Derwingson
Theodore L. Elliot, Jr.
Steven Rabinowitz
Harry Richardson, M.D.

FRIENDS ADVISORY COUNCIL
Community leaders who act as a sounding board for ideas and developing initiatives.

Robert K. Agrella
Jim Anderson
Brad Baker
Marty Bannister
Thomas H. Birdsall
Kimberly Blattner
Simon Blattner
Brad Bolinger
Corrick Brown
Bill Buchanan
Lynn Camhi
Clem Carnalli
Efren Carrillo
Herb Castillo
Norma Chandler
Brenda Christopherson
Keith Christopherson
Ken Clark
Brooke Clyde
Vivian Coffee
Thomas Croft
Jean Davis
Harriet Derwingson
Paul Dolan
Peggy Doolittle
Daniel A. Drummond
Bruce Dzieza
Pat Elliot
Carole Ellis
Whitney Evans
Jeanette Evans
Mari Featherstone
Rue Furch
Alfred E. Gilmour
Mark Gladden
Steven M. Goldberg
Lois Gordon
Susan Gorin
Joyce Griffin
Fred Groverman
Whitney Hall
Henry Hansel
Michael Hatfield
Nancy Higham
Dan Imhoff
Kathleen Inman
Simon Inman
Robert K. Jahn
Jim Keegan
Jim Lamb
Susan Lentz
Herb Liberman
Doug Lipton
Teesay Lowe
Mary McEachron
John McNulty
John Mackie
Brett Martinez

Jan Masaoka
Pat Miller
Gerarde Moret
Doug Offenbacher
Steven Oliver
Jaime Peneherrara
Chris Peterson
Christy Pichel
Steve Rabinowitz
M.L. Reinking
Mary Louise Riley
David Rosas
Susan Sheehy
Mardi Shepard
Marci Smathers
Brian Sobel
Marlene Soiland
Carolyn Stone
Jennie Tasheff
Scott G. Thayer
Mike Tomasi
Rebecca Treviño
Lynne Wallace
Timm Wallace
Steve Weiss
Barbara Wollner
Howard Wollner
Greg Young

PROFESSIONAL ADVISORY COUNCIL
Increases awareness of the Community Foundation among estate planning professionals.

Steven T. Jenkins, Chair
Vice President and Manager
Exchange Bank Wealth Management

Richard Burger
Attorney at Law

Thomas R. Croft, AAMS
Edward Jones Investments

Joni Fritsche, CPA
Anderson & Company, LLP

Thomas A. Haeuser
Attorney at Law

Deberah Kelley
Vice President & Senior Trust Officer
Wells Fargo Private Client Services

Mary Clare Lawrence
Attorney at Law
Conner, Lawrence, & Rodney

Gary R. Long, CLU
Gary R. Long Insurance and Financial Services

(707) 579-4073  www.sonomacf.org
FUND SOURCES OF GRANTS

Community Foundation Sonoma County is a pool of many funds. Approximately 10% is available for the Community Foundation's discretionary grantmaking and the remainder is specified by donors for a particular nonprofit organization, geographical area or charitable purpose. The Community Foundation leverages its knowledge and experience to inform our grantmaking from Community Endowment Funds in responding to the needs and opportunities of our community.

Sources of funds for $14.7 million in grants awarded in 2007 are:

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Percentage</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Endowment Funds</td>
<td>8%</td>
<td>$1,143,700</td>
</tr>
<tr>
<td>Community Project Funds</td>
<td>7%</td>
<td>1,058,700</td>
</tr>
<tr>
<td>Donor-Advised Funds</td>
<td>44%</td>
<td>6,527,000</td>
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<tr>
<td>Organization Funds</td>
<td>39%</td>
<td>5,694,500</td>
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<tr>
<td>Scholarship Funds</td>
<td>2%</td>
<td>262,100</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>39%</strong></td>
<td><strong>$14,686,000</strong></td>
</tr>
</tbody>
</table>

25 YEARS OF GROWTH

- **Total Assets**
- **Grants (cumulative)**

Through March 2008
GRANTS FROM ALL FUNDS BY FIELD OF INTEREST

<table>
<thead>
<tr>
<th>Field of Interest</th>
<th>Percentage</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts / Culture</td>
<td>10%</td>
<td>$1,336,000</td>
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<tr>
<td>Education</td>
<td>21%</td>
<td>$3,139,000</td>
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<tr>
<td>Environment</td>
<td>28%</td>
<td>$4,123,000</td>
</tr>
<tr>
<td>Health / Human Services</td>
<td>29%</td>
<td>$4,299,000</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
<td>$1,789,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>$14,686,000</strong></td>
</tr>
</tbody>
</table>

HOW TO MAKE A GRANT REQUEST

Community Foundation Sonoma County annually conducts six competitive grant programs. Complete descriptions, application materials, letter of intent instructions and application due dates are on our web site at www.sonomacf.org. Applicants for competitive grants must be incorporated 501(c)(3) organizations and proposed programs must serve residents of Sonoma County. After checking grant information and qualifications, contact Robert Judd, Vice President for Programs at 579-4073, ext.15 to discuss your project before submitting an application or letter of intent.
GRANTMAKING

In 2007, 815 grants and scholarships were awarded, for a total of $14.7 million. Since inception in 1983, the Community Foundation and its donors have awarded a total of $96.5 million in grants (as of 12/31/07.)

The Community Foundation serves the people of Sonoma County by responding to the needs and opportunities in our local communities. As a grantmaker, we provide fair and open access to the resources held in trust. Grants range from small, neighborhood programs to county-wide, multi-year initiatives.

There are two kinds of grantmaking: Grants that honor a donor’s charitable intent and Discretionary grants. The first category comprises 90% of our grants and is recommended by individuals, groups, businesses and nonprofit organizations with established funds at the Community Foundation. These go to support specific causes and organizations. While IRS regulations require that final decisions rest with our board, donors’ preferences are carefully considered.

Discretionary grants comprise 10% of our grants and allow the Community Foundation to utilize its collective knowledge and cumulative experience. Through an intensive review by staff, the Grants Distribution committee, the CEO and the Board, grants are made in broad fields of interest: Arts/Culture, Education, Environment and Health/Human Services, along with Ending Family Homelessness and Basic Human Needs. The Healdsburg Area Fund and Sonoma Valley Fund also award grants overseen by their boards.

The following is a listing of competitive discretionary grants awarded in 2007. A complete list of grants is on our website: www.sonomacf.org.

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BASIC HUMAN NEEDS GRANTS

Catholic Charities:
$5,000 to partially pay for costs of utilities at the Family Support Center.

 Cloverdale Community Outreach Committee:
$5,000 to provide shelter, food bags and vouchers, utility assistance and transportation vouchers for Wallace House clients.

 Committee on the Shelterless:
$5,000 to provide nourishing meals to low-income children and adults and weekly food boxes to seniors and families.

 Community Action Partnership of Sonoma County:
$5,000 for utilities and insurance costs of operating the Sloan House shelter for homeless women and their children.

 Council on Aging:
$5,000 to provide home delivered food to extremely low-income clients.

 Kids In Distressed Situations, Inc.:
$5,000 to provide $50,000 worth of new children’s products, especially clothing, for distribution by the Redwood Empire Food Bank.

 Migrant Education:
$5,000 to provide food and clothing to migrant families and migrant out-of-school youth.

 North County Community Services:
$5,000 to partially cover lease costs of an apartment for a homeless family.

 Petaluma People Services Center:
$5,000 to deliver hot, nutritious meals to homebound seniors.

 Rebuilding Together Santa Rosa:
$3,000 to hire contractors to repair substandard housing conditions for low-income homeowners.

 Redwood Empire Food Bank:
$5,000 to ensure that low-income students have nutritious food on weekends.

 River to Coast Children’s Services:
$5,000 to provide emergency basic supplies, emergency child care, transportation assistance and shelter to low-income families.

 West County Community Services:
$5,000 to provide emergency food to families, disabled persons and seniors in need.

 ENDING FAMILY HOMELESSNESS GRANTS

Catholic Charities:
$30,000 to help homeless families retain housing and learn life skills necessary for long-term self-sufficiency.

 Committee on The Shelterless:
$25,000 to help formerly homeless families keep their housing with volunteer mentor support.

 Committee on The Shelterless:
$25,000 to break the generational cycle of homelessness by providing affordable housing and support services to families.

 Community Action Partnership of Sonoma County:
$20,800 to break the cycle of homelessness for mothers with small children through support, education and services in the Caring Communities program.

 Women’s Recovery Services/A Unique Place:
$25,000 to help women move from lifestyles of addiction and homelessness to being a competent, single, sober parent.

 YWCA of Sonoma County:
$25,000 to assist homeless women with children who have fled domestic violence in gaining housing stability, family preservation, well-being and safety.
### EDUCATION GRANTS

**Arts Council of Sonoma County:**
$7,500 to train K-12 teachers to integrate arts disciplines with core academic curriculum.

**Arts Council of Sonoma County:**
$15,000 for California Poets In The Schools to improve English and literacy skills among low-income students through a series of poet-in-residence teacher programs.

**The Bay Institute:**
$25,000 to improve environmental education for both K-12 teachers and students through a program of watershed studies.

**Santa Rosa Symphony:**
$25,000 to develop and implement a new music education paradigm which supports teaching core subject matter through music.

**Sonoma Ecology Center:**
$20,000 to increase science achievement for elementary students while developing their knowledge of native organisms and local ecosystems.

### ENVIRONMENT GRANTS

**Gold Ridge Resource Conservation District:**
$15,000 to decrease erosion and improve riparian habitat through restoring 4,000 feet of degraded streambank on Salmon Creek.

**Laguna de Santa Rosa Foundation:**
$25,000 to help guard against the extinction of endangered local endemic plants through creation of a long-term endangered plant population survey.

**Stewards of the Coast and Redwoods:**
$14,300 to identify and map fencing on ranches that are now park lands, to remove fences and improve habitat connectivity in Austin Creek, Willow Creek and coastal park lands.

### HEALTH AND HUMAN SERVICES GRANTS

**Children's Village of Sonoma County:**
$27,500 to counter social isolation by providing children with on-site enrichment programs and participation in community-based activities.

**Community Action Partnership of Sonoma County:**
$25,000 to improve the health of school children through a program of dental screening, fluoride application and education.

**Girl Scouts of Northern California:**
$25,000 to help girls make positive life choices through equipping them with the tools they need to make good decisions and gain a strong sense of their own identity.

**Legal Aid of Sonoma County:**
$5,000 to help battered women and children achieve physical safety and financial security in order to become self-sufficient and stop their abuse.

**Sonoma Valley Mentoring Alliance:**
$25,000 to help elementary, middle and high school students succeed academically, socially and emotionally through providing long-term mentors.

**Summer Search North Bay:**
$25,000 to help low-income youth acquire the skills and attitudes needed to complete high school and college and succeed as adults who contribute back to their communities.

### INITIATIVE GRANTS

**Arts Council of Sonoma County:**
$40,000 to increase audiences for Sonoma County arts organizations through creating a comprehensive arts website.

**Arts Council of Sonoma County:**
$33,000 to broaden the Emerging Artist program’s visibility and impact in Sonoma County.

**Arts Council of Sonoma County:**
$29,500 for implementation of Performance Sonoma.

### SONOMA VALLEY FUND GRANTS

**Boys and Girls Club - Valley of the Moon:**
$2,500 to host a Geographic Information Systems Day to promote awareness of open space, conservation and land stewardship.

**La Luz Bilingual Center:**
$2,000 to improve the effectiveness of client services through training staff in the use of tools for measuring client progress.

**Sonoma Ecology Center:**
$3,000 to create a greater sense of community by increasing the diversity of groups participating in The Watershed Walk.

**Sonoma Overnight Support:**
$5,000 to enhance the expertise and skills of board members through a board training and development program.

**Sonoma Valley Mentoring Alliance:**
$3,000 for a one-day workshop on Behavioral Intervention Strategies to increase the skills, confidence and ability of mentors who work with students.

**Sonoma Valley Museum of Art:**
$5,000 to promote cultural exchange between Latino and Anglo communities through the Dia de Los Muertos celebration.

**Valley of the Moon Natural History Association:**
$1,500 to energize and strengthen the board and clarify long-term goals.
OUR FUNDS

Community Foundation Sonoma County administers 393 funds, including 35 new funds opened in 2007. These serve a wide variety of charitable purposes and reflect the intent of our donors. Endowment funds are the backbone of the Community Foundation’s effectiveness, providing support for present and future needs and opportunities in perpetuity. The principal is carefully invested and the earnings payout is used for grants. Expendable (non-endowed) funds make grants from the earnings or principal. Bold italic type indicates new funds in 2007.

Community Endowment Funds
These provide the major resources used by the Community Foundation to make Discretionary grants. Since needs and opportunities evolve and change, our ability to respond effectively is maximized by having flexible funds. Legacy gifts are a primary way these funds grow.

Emerging Artists Endowment Fund
Community Endowment Fund
Fund For Basic Human Needs
Fund for Education
Fund For The Arts
Fund For The Environment

Field of Interest Funds
Individual donors may establish endowment funds to support their particular charitable interests. These are often created or added to by planned gifts which fulfill a donor’s legacy.

Arnold and Dorothy Kelly Fund
Barney H. and Dorothy O. Lieurance Endowment Fund
Betty’s Fund
Bruce Lalor Fund
Catherine L. O’Brien Fund for the Environment
Charl E. Rhode Fund for the Environment & Education
Charles DeMeo Memorial Funds
Cochran Family Fund
David Michael Stone Memorial Fund
Ding and Henry Arian Family Fund
Disaster Relief Fund
E. Johnnie Tarchini Endowment Fund
Farm Worker Housing Fund
Father Gerald F. Thomas Fund
Furth Family Foundation Fund
Hospital Chaplaincy Services Fund
Jean Forsyth Schulz Fund for the Environment
Julia Grant Unrestricted Endowment Fund
Marcia L. Anderson Memorial Fund
Nancy Henshaw Fund
Rainbow Fund
Real Estate Housing Endowment Fund
Remak-Mosenthal Fund
Royce L. and Carolee Van Bebb Family Fund
Russian River Community Trust Fund
Ruth E. and Ovid S. Tuttle Fund for Historic Preservation
Salatko Animal Welfare Fund
Sarah D. Rodgers Fund
Sonoma County Seniors’ Fund
Spectrum Hospice Fund for Palliative Care
Wilma B. Kery Fund
Women’s and Girls’ Endowment Fund

Donor-Advised Funds
These are established by individuals or companies. Donors recommend grants from the fund. As desired, we provide grantmaking assistance in support of donors’ interests. Families can establish youth-advised funds in the name of any child to help children learn about charitable giving.

Abacot Fund
Acorn Fund
Ambrose R. Nichols, Jr. & Barbara S. Nichols Fund
Animal Care Center Foundation
Ann Sebastian Fund
Bard Family Fund
Bearden Family Fund
Benson Family Fund
Blue Creek Fund
Brewster Fund
Brittany Allene Eames Fund
Broderick Fund
Bruno Schurter Fund
Catalyst for a Sustainable Future
Countyta Family Fund
Chatton-Young Fund
Cherrybrook Fund
Chris & Lisa Dobson Fund
Chris and Cheree Hayes Foundation
Chuck Herring Memorial Fund
Claire K. Davis Donor Advised Fund
Clem Stornetta Fund
Dan D. Smith & Joan Marler-Smith Fund
Daphne Smith Fund
Diane Coddington Memorial Fund
Don Blaugh Fund LGBT Fund
Dougherty Family Fund
Drew and Ellen Bradley Fund
Edwin Cutler Memorial Fund
Eleanor Morgan Memorial Music Fund
ERIN’s Fund
Ernie Carpenter Funds for the Environment
Feather Fund
Ferrogiaro Family Fund
Flowers Family Fund
Frank Howard Allen Realtors Fund
Freedom Fund
Friedman Family Foundation Fund
Geary Family Fund
Handelman Family Hunger and Nutrition Fund
Harvey and Janet Chamofsky Fund
Healdsburg School Fund
Housing Trust of Sonoma County Fund
Hub of Petaluma Fund
Hurst Family Fund
Ilumination Fund
Imhoff Family Fund

Imperial Fund for Youth
J & J Charitable Fund
Jackson Fund
James McGrew & Nancy K. Cadigan Fund
James Miller Endowment Fund
James T. and Phyllis J. Carter Fund
Jane and Herb Dwight Fund
Janice March Fund
Jeanette Wilking Fund B
John Mackie and Kate Ecker Fund
Jonathan Alan Field Memorial Fund
Joseph A. & Judith M. Gajtta Fund
Joseph and Joan Panaro Fund
JSO Fund
Jules and Barbara Glaser Fund
Julia L. Grant Donor Advised Fund
Julia Rose Coughlan Memorial Fund
Karen and Ralph Hanahan, MD Fund
Kathy Kent and John Dolinsek Fund
Kay & Wanda Il Fund
Kelly Bates Memorial Neonatal Transport Fund
Ken Martin Family Fund
Ken Orton Natural Horsemanship Memorial Fund
Kirsten Pignih Memorial Fund
La Gioia Fund
La Posada Fund
Larry and Gudrun Simons Fund
Lawrence Simons Fund
Leland and Louise Levinger Fund For Music
Mayflower Fund
McCann Family Fund
Norman-Teist Memorial Fund
Oaks Educational Fund
Opportunity Fund
Patricia Eames Dickinson Family Fund
Patrick Kilkenney Fund
Pollinator Fund
Press Democrat Celebrate Community Fund
Pumpkin Fund
Rae Lee Thompson Helping Hands Fund
Richard E. and Diane I. DuNah Fund
Richard Kunde & Saralee McClelland Kunde Fund
Richardson Family Fund
RiskPress Fund
Robert H. Walter Family Fund
Robert Hillmann Fund
Ron & Eileen Nelson Fund
Ruth and David Wolf Fund
Savannah Hill Music Scholarship Fund
Schulz Donor Advised Fund
Scott Lane Teen Counseling Project of Sonoma County
Semilla Fund
Shirley Ann Spencer Fund
Sonoma Health Fund
Stupin Fund For The Arts
The AWEsome Fund
The Soiland Family Charitable Fund
Thomas Ryan Earmes Fund
UBS Financial Services Community Fund
Valis Fund
Voigt Family Fund
Wendt Family Charitable Foundation
Willow Creek Financial Services Fund
Wright Family Fund
Zeller Family Fund

**Organization Funds**

*Individuals or nonprofit organizations can establish these for a specific nonprofit beneficiary.*

Organization endowment funds are particularly valuable in assuring long-term financial stability and independence. There are currently more than 83 funds.

Archer Forsyth Memorial Fund/Mill Valley Library Arts at Analy Fund
Bennett Valley Education Foundation Fund
**Blood Bank of the Redwoods Funds**
Bonner Family Huntington’s Disease Foundation
Boys and Girls Club of Petaluma Fund
Canine Companions for Independence - (Alice Levin Fund, Ernest & Welthat Zambelli Fund, Joan & Charles Taylor II Memorial Fund, Joyce Oliver Fund, Mark Emrick Fund, Michael James East Fund)
Carol Chase Endowment Fund for the Cloverdale Senior Multipurpose Center
Cartoon Art Museum of San Francisco Fund
Center for Spiritual Living Santa Rosa Legacy Foundation
Charles M. Schulz Museum and Research Center Funds
Children’s Health Initiative Funds
Children’s Village Fund
Circuit Rider Productions Building Fund
**Claire Calderon Memorial Endowment Fund**
Community Health Foundation of Greater Petaluma Funds - (Groverman Family Fund, Horace & Dorothy Henrice Family Endowment Fund, Petaluma Health Center Fund, Youth Nutrition Fund)
Community Support Network Endowment Fund
Committee on the Shelterless (COTS) Rainy Day Fund for Children
Edward J. Kavanaugh Fund for St. Vincent de Paul High School
Elinor Vallerga Fund
Florence Lang Endowment Fund for the Center for the Creative Arts Therapies
Friends House Fund
**Ft. Ross Educational Foundation Endowment Fund**
George L. Ortiz Fund
George M. Firestone Fund for Continuing Medical Education
Harry P. and Helen B. McStravick Fund for the Homeless
Healdsburg Animal Shelter, Inc. Fund
Healdsburg Museum and Historical Society Endowment Fund
Hope Washburn LWV Citizen Education Fund
Humane Society Endowment Fund
James Brecht Memorial Fund for the Sonoma County Food & Wine Marketplace
James Staley Memorial Fund
Jamie Westoby Memorial Fund
Jeanne Shacklett Endowment Fund for the Children’s Village
Jewel Fund
Jordan Investment Company Fund for Hanna Boys Center
Juelle Hinman Fund for the Santa Rosa Children’s Chorus
Kenwood Community Church Endowment
**Kenwood Community Church Fund**
KRCB Fund
Laguna de Santa Rosa Foundation Endowment Fund
LandPaths Fund
LandPaths Riddell Fund
Leadership Institute for Ecology and the Economy Fund
**Luther Burbank Gold Ridge Experimental Farm Endowment Fund**
Luther Burbank Home & Gardens Funds
Luther Burbank Memorial Foundation Fund
Marvin Klebe Memorial Fund
Miller/California Parenting Institute Fund
Monastery Project Fund
Norma and Victor Waithman Fund for the Sonoma Land Trust
Orchestra Sonoma Fund
**Pacific Coast Air Museum Building Fund**
Palm Drive Health Care Endowment Fund
Pepperwood Foundation Fund
Petaluma Phoenix Center Fund
Ron Mortimore Fund
Roseland University Prep Fund for Scholarships
Roswell H., Camille M., and Joan M. Cochran Glen Oaks Fund
Rykken and Scull Trust - PFLAG North Bay Endowment Fund
Santa Rosa Courthouse Square Reunification Fund
**Santa Rosa Rural Cemetery Endowment Fund**
Santa Rosa Rural Cemetery Restoration Fund
Santa Rosa Senior Center Building Fund
School Garden Network Fund
Schulz Canine Companions for Independence Funds
Sebastopol Community Center Building Our Future Fund
Senior Advocacy Services Legacy Circle Fund
Sharon Malm Read Endowment for the Rural Food Project
Social Advocates for Youth Fund
Sonoma County Trailblazer Foundation Fund
Sonoma Land Trust Stewardship Fund
Sonoma Valley Historical Society Endowment Fund
Southwest Community Clinic Health Services Fund
**Southwest Community Health Center Capital Fund**
St. Vincent de Paul High School Funds
St. Vincent’s Elementary School Building Fund
SunRidge School Fund
The Active 20-30 Club of Santa Rosa No. 50 Endowment Fund
United Cerebral Palsy of the North Bay Fund
United Way of Sonoma-Mendocino-Lake Fund
Van Hoosier Wildflower Preserve Fund
Vintage House Senior Center Endowment Fund (Anne & John Cowles Fund, Maybeth & Bill Sanderson Fund)
Volunteer Center Endowment Fund
Wilma B. Kery Fund-San Francisco SPCA
Wilma B. Kery Fund-San Francisco State University Music Scholarship
Windsor Historical Society Fund
Windsor Historical Society Museum Fund

**Community Project Funds**

*Individuals or groups of donors can establish funds to support an area of interest. Funds may have advisory committees. Community projects focus on a particular community project or activity.*

Ana Fields Goals Fund
Camilo Adobe Restoration Fund
Cinco de Mayo Fund
Community Action Program Fund
DeTurk Round Barn Restoration Fund
Emerging Artists Endowment Fund
Emerging Artists Fund
Healthcare Workforce Development Roundtable Fund
Howarth Park Land of the Imagination Fund
Irvine Communities Advancing the Arts Initiative Fund
North County Swim Center Fund
Oral History Project Fund
Roseland Community Development Project Fund
Santa Rosa Historic Heritage Church of One Tree
Santa Rosa Veterans Memorial Monument Fund
**Sonoma Paradiso Funds**
Sonoma Provence Exchange Fund
Toolbox Project Fund

**Scholarship Funds**

_These are endowments; interest payout is used to assist students with higher education. In some cases, donors and committees participate in the selection process._

100 Black Men of Sonoma County Scholarship Funds
American Institute of Architects Redwood Empire Scholarship Fund
Andrea Vicini Educational Scholarship Fund
Bill Sanderson Fund (Anne & John Cowles Fund, Maybeth & James Brecht Memorial Fund for the Sonoma Land Trust)
**Bill Sanderson Fund**
**Bowerman Memorial Scholarship Fund**
**Carlisle Van Ornum - H.E.L.P. Scholarship Fund**
**Carlisle Van Ornum Vocational Scholarship Fund**
Castner Scholarship Fund - Cloverdale
Carrillo Adobe Restoration Fund
**Carrillo Adobe Restoration Fund**
DeTurk Round Barn Restoration Fund
Emerging Artists Endowment Fund
Emerging Artists Fund
Healthcare Workforce Development Roundtable Fund
Howarth Park Land of the Imagination Fund
Irvine Communities Advancing the Arts Initiative Fund
North County Swim Center Fund
Oral History Project Fund
Roseland Community Development Project Fund
Santa Rosa Historic Heritage Church of One Tree
Santa Rosa Veterans Memorial Monument Fund
**Sonoma Paradiso Funds**
Sonoma Provence Exchange Fund
Toolbox Project Fund

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HEALDSBURG AREA FUNDS

Community Endowment Funds
Community Endowment Fund
Healdsburg Area Fund

Donor-Advised Funds
David H. Anderson MD Fund
CW Healthcare Fund
Dayton Family Fund
Jane and Herb Dwight Fund,
Healdsburg Affiliate
Equine Therapy Fund, in memory of
Cordelia Anne Brinton
Harold Hahn and Tania Amochaev Fund
Hotel Healdsburg Fund
Kingsbury/Burg Family Fund
Kismet Fund
Teri Loveland Fund
Seaver and Lynn Page Fund

Organization Funds
Boys & Girls Club of Healdsburg Fund
Felta Endowment for Educational Excellence
Healdsburg Dog Park Endowment Fund
Friends of the Healdsburg Library
Endowment Fund
Healdsburg Performing Arts Theater
Endowment Fund
Healdsburg Performing Arts Theater
Expendable Fund
Healdsburg Little League Education Endowment
Ruckle Memorial Endowment for the
Enrichment of Art & Music Education

St. John the Baptist Catholic School
Endowment Fund

Community Projects
Eugene J. Cuneo Memorial Fund for
the Enduring Spirit Project
Healdsburg Plaza Gazebo Fund

Scholarship Funds
Soroptimist International of
Healdsburg Scholarship
St. John the Baptist Catholic School
Conran Scholarship Fund

SONOMA VALLEY FUNDS

Community Endowment Funds
Sonoma Valley Endowment Fund
Sonoma Valley Expendable Fund
Ellman Fund for Sonoma Valley

Donor-Advised Funds
Whitney and Jeanette P. Evans Fund
JaMell & Tom Perkins Family Fund

Organization Funds
Valley of the Moon Boys & Girls Club
Endowment Fund
Charlotte Lamb Exhibition Reserve Fund of
the Sonoma Valley Museum of Art

STAFF

LEFT TO RIGHT: Patti Crandall, Senior Accountant; Jean Harrison, Officer Manager; Corinne Giannamore, Accounting Clerk; Suzanne Adams, Controller; Paul DeMarco, Vice President for Finance & Administration; Mary Peterson, Development Assistant; Miguel Ruelas, Donor Relations Officer; Celia Bolam, Planned Giving Officer; Ina Chun, Communications Officer; J Mullineaux, Vice President for Development; Kay Marquet, President & CEO; Joe Valentine, Affiliate Relations Officer; Melissa Kester, Development Officer for the Arts; Robert Judd, Vice President for Programs; Dana Johnson, Grants Manager.
TOTAL ASSETS  $137 MILLION (12/31/07)

In 2008, endowments will generate $3,200,000 in grant dollars. Of that, 81% has a charitable purpose established by the donor. The other 19% ($612,000) will be available for Community Foundation Discretionary grants.

ENDOWMENT & QUASI-ENDOWMENT FUNDS
These permanent funds create a sustainable flow of grants dollars in perpetuity. Through prudent investing, both the body of the endowment and the amount generated for grantmaking increase over time.

33% Nonprofit Organization
23% Field of Interest
20% Field of Interest – DeMeo Fund
9% Scholarship
9% Unrestricted
6% Donor-Advised

EXPENDABLE FUNDS
These may be granted out at any time. Of these, 89% have a charitable purpose established by fund donors.

42% Nonprofit Organization
42% Donor-Advised
9% Field of Interest – DeMeo Fund
3% Community Project
2% Scholarship
2% Operating Fund

NON-GRAntABLE ASSETS
These include irrevocable future distributions from charitable trusts, assets of DeMeo Teen Club, Inc. and furniture and equipment.

45% $61 M
36% $50 M
19% $26 M

INVESTMENT PERFORMANCE

Our funds are combined into investment pools for economy of management and access to the best management and advisory talent available. Four pools provide donors with options to meet their philanthropic goals.

Main Long-term Pool: In its 11 years since inception, our main pool has returned an average annual return of 8.9%, net of management and custody fees. These returns exceed the minimum return necessary to protect the value of endowment principal in real dollars. For our endowment funds, this means both real dollar growth in principal and a steady flow of grant dollars each year to our community.

Socially Responsible Long-term Pool: Since inception in May 2001, this pool has grown from $160,000 to $14 million. Thirty two funds now participate in this pool. As the pool has grown, we have been able to improve the diversity of our investments and the quality of our managers. In 2007, this pool out-performed the long-term pool by 0.4%.

Intermediate-term Pool: This pool has continued to meet its target return. With a strategic allocation of 75% fixed income and 25% equities, it offers an attractive vehicle for funds that are intended to be granted out within 2-5 years.

Short-term Pool: This provides competitive money market rates for expendable funds.

A poor fourth quarter in U.S. and world equity markets erased many of the gains of the prior nine months in 2007. Our pools performed relatively well in the down markets.

<table>
<thead>
<tr>
<th>POOL</th>
<th>POOL ASSETS AT 12/31/07</th>
<th>2007 RETURN (net of fees)</th>
<th>RETURN SINCE INCEPTION (net of fees)</th>
<th>BENCHMARK RETURNS SINCE INCEPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-term Pool</td>
<td>$78 M</td>
<td>5.1%</td>
<td>8.9%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Jan 1997 inception</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Socially Responsible</td>
<td>$14 M</td>
<td>5.5%</td>
<td>4.4%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Long-term Pool</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May 2001 inception</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intermediate-term Pool</td>
<td>$3.2 M</td>
<td>5.8%</td>
<td>5.6%</td>
<td>5.8%</td>
</tr>
<tr>
<td>July 2003 inception</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All returns annualized. Returns do not deduct foundation support fees, which may vary by fund.
This is a condensed presentation of the Balance Sheet, including the DeMeo Teen Club, Inc. The complete audited financial statement as prepared by Moss Adams LLP is available upon request.

### Assets 2007 Audit 2006 Audit

<table>
<thead>
<tr>
<th>Asset</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$11,844,100</td>
<td>$14,747,400</td>
</tr>
<tr>
<td>Receivables</td>
<td>1,796,400</td>
<td>1,781,400</td>
</tr>
<tr>
<td>Charitable Lead Trusts</td>
<td>9,994,900</td>
<td>12,897,000</td>
</tr>
<tr>
<td>Bequests Receivable</td>
<td>1,000,000</td>
<td>350,400</td>
</tr>
<tr>
<td>Investments</td>
<td>98,072,000</td>
<td>88,945,700</td>
</tr>
<tr>
<td>Property &amp; Equipment, net</td>
<td>5,306,200</td>
<td>5,446,100</td>
</tr>
<tr>
<td>Assets Held in Remainder Trust</td>
<td>8,625,800</td>
<td>8,589,600</td>
</tr>
<tr>
<td>Other Assets</td>
<td>69,300</td>
<td>87,000</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$136,708,700</strong></td>
<td><strong>$132,844,600</strong></td>
</tr>
</tbody>
</table>

### Liabilities

<table>
<thead>
<tr>
<th>Liability</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>99,200</td>
<td>80,300</td>
</tr>
<tr>
<td>Distributions Payable</td>
<td>1,031,300</td>
<td>1,440,100</td>
</tr>
<tr>
<td>Due to Other Nonprofit Organizations</td>
<td>12,573,300</td>
<td>11,336,500</td>
</tr>
<tr>
<td>Liabilities Under Remainder Trust</td>
<td>7,456,400</td>
<td>7,615,800</td>
</tr>
<tr>
<td>Other Liabilities</td>
<td>224,500</td>
<td>239,800</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>21,384,700</strong></td>
<td><strong>20,712,500</strong></td>
</tr>
</tbody>
</table>

### Net Assets

| Net Assets                             | 115,324,000 | 112,132,100 |

### Total Liabilities & Net Assets

| Total Liabilities & Net Assets         | **$136,708,700** | **$132,844,600** |

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1. Future Interest in Charitable Lead Trusts: The Community Foundation is the irrevocable beneficiary of several lead trusts that will contribute approximately $17.2 million over the next 16 years. While these funds have not yet been received, and generate neither income nor funding for grants, they are valued in accordance with guidelines from the Financial Accounting Standards Board (FASB) at net present value.

2. Assets Held in Remainder Trust: The Community Foundation is the irrevocable remainder beneficiary of a charitable remainder trust, for which it is also the trustee. Accordingly, trust assets are measured and recognized at fair market value, and the net present value of the estimated future payment obligation to the donor is recognized as a liability. The Community Foundation is also a revocable remainder beneficiary in two charitable remainder trusts for which it is the trustee. For these trusts, the full fair market value of the trust is reported as an asset and reported as an equal offsetting liability amount.

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INSIDE BACK COVER: Haupt Creek Bridge, Healdsburg.
Endowments create legacies which span time. While immediate gifts of charity can help meet current needs, funds from endowments keep giving and help shape the future. Creating an endowment or contributing to one implements long-term, self-perpetuating generosity.

The bridges to the future you can create are limited only to your imagination. With many options to personalize your philanthropy and donor services to assist you, Community Foundation Sonoma County can help you manifest your philanthropic legacy in ways that keep it strong, flexible and resilient, like a great bridge, for good and forever.
THE MISSION OF COMMUNITY FOUNDATION SONOMA COUNTY IS TO STRENGTHEN OUR LOCAL COMMUNITIES THROUGH EFFECTIVE PHILANTHROPY AND CIVIC ENGAGEMENT.