

COMMUNITY FOUNDATION SONOMA COUNTY

2009 ANNUAL REPORT



PRESERVING, BUILDING AND CELEBRATING COMMUNITY ASSETS



WORKING TOGETHER

The mission of Community Foundation Sonoma County is to strengthen our local communities through effective philanthropy and civic engagement.

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DEAR FRIENDS,

Sonoma County is a place with a special energy, a current that brings people together. It is a place where we build families, friendships and neighborhoods, where every resident is an architect of our community. The energy that we dedicate to Sonoma County preserves our history and creates our future.

Sonoma County grows stronger as we work together to nurture and educate our youth, provide for those in need, protect our environment, and unleash the transformative power of art. The Community Foundation works with our fundholders and nonprofit organizations to direct this energy to achieve a vibrant, healthy community. We are fortunate to steward gifts that improve our quality of life.

We celebrate the commitment and foresight of Hazel and Roland Todd, a long-time Glen Ellen couple, who have assured significant ongoing support for the community through an estate gift. We celebrate the vision of Steve and Nancy Oliver, who created a ranch unlike any other, then chose to share their passion through an innovative model of philanthropy. The Oliver Ranch Foundation, in partnership with the Community Foundation, will continue to inspire and enthrall with unparalleled vistas, sculpture and performance. These gifts and hundreds of others, large and small, contributed to the growth of Community Foundation assets from \$112 million to \$143 million in 2009.

We are also connected to the energy of organizations and individuals who work each day to make a difference. As the current economy continued to challenge our nation and our county in 2009, the Community Foundation, together with our donor advisors, awarded \$13 million in grants and scholarships to support nonprofit organizations and local students. Almost half of our grants provided support to those agencies serving the most vulnerable populations.

With a focus on results and action, we bring together diverse voices to discover the pressing issues and the most effective ways to work towards solutions. We reach out to donors who continue to support our Ending Family Homelessness Initiative, recognizing the strength of a new collaborative effort to tackle chronic homelessness. Our Sonoma Valley Fund has addressed local needs with a comprehensive Youth Initiative, employing the knowledge of community leaders and delivering a thoroughly researched and targeted action plan.

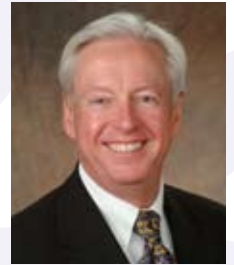
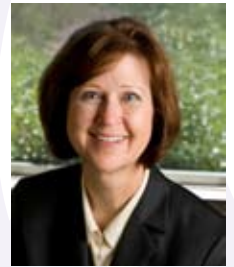
In Sonoma County, we are graced with the energy of giving that extends through our volunteers, our fundholders, our advisors and our partners. We call upon you to work with us to take action now and to engage in the long-term planning necessary to build our shared future.



Barbara Hughes, *President & CEO*



David Voss, *Board Chair*



We applaud the service of our longtime volunteer Lee Chandler, who steps down only from his official Board responsibilities, but continues, with his wife Norma, to be a guide for how to give back.



THE PRESERVATION OF BLUE WING ADOBE

The city of Sonoma can boast that it is home to the most intact remaining 2-story adobe in northern California. Built between 1835 and 1852, the Blue Wing Inn was one of the first inns in California, now California State Landmark #17 and a contributor to the Sonoma Plaza National Landmark District. However, the qualities that make the Blue Wing Adobe unique to the history of California also make it vulnerable to the ravages of time. The building, which is part of Sonoma State Historic Park, has been closed to the public since 2001.

The Blue Wing Adobe Preservation Committee (BWAPC) formed in July 2009 to raise funds and participate in planning for the seismic stabilization and adaptive re-use of the historic Monterey-style adobe. Since the State Historic Parks System has very little money for planning, restoration, operations, or public programming, a significant part of the Committee's work is to raise public awareness of the Blue Wing, in terms of both the need for restoration, and its potential to serve the community.

One of the Committee's first steps was to establish the Blue Wing Adobe Stabilization and Preservation Fund at Community Foundation Sonoma County. The Community Foundation's reputation for solid, long-term management of funds and for its ability to convene individuals and groups with similar interests made it a clear choice as the Committee embarked on the project.

Along with the Community Foundation, BWAPC is working in partnership with California State Parks and the City of Sonoma in this effort. To find out more about the Blue Wing as a contributor to the City of Sonoma's historic past and its future economic viability, check out Doug McConnell's video on our website.

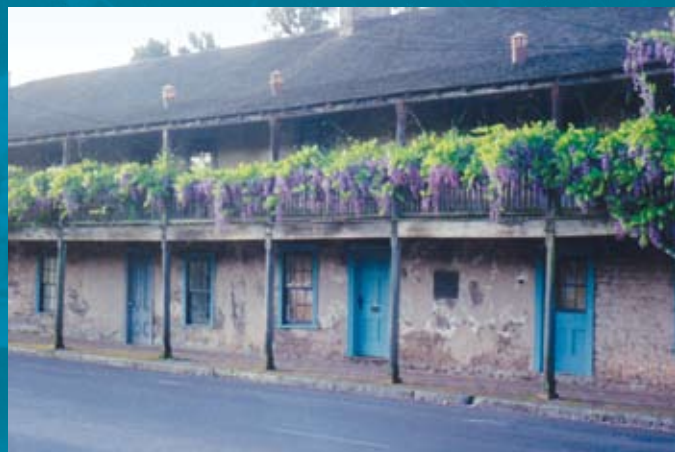


Photo Credit: Courtesy of Blue Wing Adobe Preservation Committee

2010 STAFF AND COMMITTEES

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Tania Amochaev
Bruce Dzieza
Whitney Evans
Whitney Hall
Linda Kachiu
Art Lafranchi
David Voss
Joan Woodard

PUBLIC SCHOOL SUCCESS IN HEALDSBURG

The Public School Success Team (PSST!) in Healdsburg was founded to increase the graduation rate from its local High School. Created by area activists Tania Amochaev, Jane Rosenberg, Barbara Epstein and Lynne Brett with the goal of leveraging the knowledge, energy, and philanthropy of the Healdsburg community to reach this goal, PSST! is demonstrating early success.

According to Tania Amochaev, educators have defined 5th grade as the “sweet spot” of a child’s education—the time when they are “young enough to be open to outside support, but old enough to be thinking about graduation and beyond.” Typically, economically disadvantaged students and those who are English learners struggle more than others to achieve academic success. Raising the level of educational attainment is a significant challenge throughout Sonoma County. Enter PSST!, a group who launched a long-term tutoring and support program for all interested 5th graders to give students the support they need to master the curriculum through high school.

Photo Credit: Courtesy of PSST!



LEARN MORE: www.hbgpsst.com

A Fund created at Community Foundation Sonoma County set up tuition grants for the 30 fifth graders adopted by PSST! in 2009. These tuition grants will be available to students when they graduate from Healdsburg High School in 2017 and will amount to \$2,000 per student. Support from Syar Corporation, the Kiwanis Club of Healdsburg, the Rotary Club of Healdsburg and State Farm Insurance, as well as individual community members, have helped seed the Public School Success Team Fund. Other community partners include the Healdsburg Unified School District, the Boys and Girls Club of the North Bay, Sonoma State University, EandM and General Dynamics. Already, parents report that their students are doing better, attendance at tutoring is high and school attendance has increased.

ENDING FAMILY HOMELESSNESS

Community Foundation Sonoma County has long been involved with the issue of homelessness and became increasingly committed to addressing this challenge when Charles DeMeo left us a bequest with the provision that we devote a portion of his gift “...to benefit the homeless people of Sonoma County, with a primary emphasis upon mothers with young families...to enable them to better provide for themselves and their families and to become full and meaningful participants of society.”

While no single program can eliminate homelessness, the Foundation has embarked upon a five-year plan to develop a significantly different approach to this chronic problem and is currently engaged with Catholic Charities, Committee on the Shelterless (COTS) in Petaluma, Community Action Partnership, Women’s Recovery Services, and the YWCA. Over the course of the past two years, the Foundation has held a series of meetings designed to help these organizations share knowledge and resources and identify measures that will guide program work and goals.



Photo Credit: Courtesy of COTS.

All involved believe that in working together, a system can be implemented that will address the reasons families become and remain homeless and that through this work, families who are currently homeless will be able to find permanent housing and break the cycle of multi-generational homelessness. The value of working together cannot be overstated. While each of us understands a piece of the puzzle, it is through a collaborative effort that solutions will be found and implemented.

THE OLIVER RANCH STORY



Photo Credit: Susan McDowell



Photo Credit: Alex Fradkin

The Olivers describe their adventures at the ranch, and with the artists, not so much as “collecting art,” but as “collecting experiences.”



Located in the heart of Sonoma County, the Oliver Ranch is home to 18 remarkable site-specific sculptures, the most recent of which is the tower designed by Ann Hamilton which is host to commissioned dance, poetry, theatre, and music performances. The picturesque 100-acre property was originally bought by Steve and Nancy Oliver in 1981 to serve as a site to graze a few extra sheep, and became, as Steve says, “my daughter’s 4-H project gone bad.” The ranch’s evolution from exiled sheep quarters to world-renowned sculpture ranch was gradual and organic, a natural convergence of the Olivers’ longstanding passion for art and deep connection to the land.

The Olivers describe their adventures at the ranch, and with the artists, not so much as “collecting art,” but as “collecting experiences.” The Olivers only direction to the artists has been that they “respond to the land.” Both Steve and Nancy share decision-making in the choice of artists, followed by Steve’s role as “studio assistant” in construction and, later, as “tour guide” leading a two and a half mile walk and recounting the story of each work. These tours, along with original performance works in the Hamilton tower, help raise funds for other nonprofits.

In 2009, the Olivers partnered with Community Foundation Sonoma County to create the Oliver Ranch Foundation as a supporting organization of the Community Foundation. This partnership assures that the Olivers’ vision for the Ranch continues into perpetuity and allows the Olivers to leave the ranch in local hands. As of 2009, the Olivers contributed to the Oliver Ranch Foundation an undivided interest in the land and the sculptures affixed to the land, with plans for the remaining interests in the property to go to the Foundation over the Olivers’ lifetimes.

COMMUNITY FOUNDATION AFFILIATES

HEALDSBURG AREA

Since its inception in 2003, the Healdsburg Endowment Fund at Community Foundation Sonoma County has been a catalyst for local philanthropy and investment in the region's non-profit organizations. Assets generated by the Endowment have provided more than \$145,000 in grants to 17 non-profit organizations in Healdsburg and Geyserville through an annual, widely publicized grantmaking process.

In 2009, the Healdsburg Area Board decided to shift its grantmaking focus from programs to general operating support, recognizing that many grant programs require an emphasis on program implementation, often leaving organizations struggling to pay their overhead and operational costs. This change in granting criteria helped local nonprofits to expand their facilities, to maintain staff levels or in some cases to hire additional personnel, and to meet their training and staff development needs for greater organizational capacity.

This year also marked a transition in leadership. Long-time Community Foundation board member and past president Lee Chandler retired after 7 years of service in the Healdsburg area. Richard Burg, another founder, past board chair and generous volunteer of the Healdsburg Affiliate, rotated out of his role as well; both have been invaluable. Even with these changes, the Healdsburg board is excited about branching out in new directions and embracing a renewed enthusiasm for increasing overall giving in the community.

HEALDSBURG AREA BOARD

Susan Lentz, *Chair*
Tania Amochaev
Todd Au
Chris Baldenhofer
Richard Burg
Lise Ciolino
Stu Harrison
Taya Levine
Lynn Woznicki

SONOMA VALLEY FUND

In 2009 Sonoma Valley Fund awarded six grants from the George and Phyllis Ellman Fund totaling \$25,500 to support nonprofit programs covering historic preservation, environment, environmental education, or a combination of these areas.

2009 also saw the establishment of the Youth Initiative Committee. Over a nine-month period, representatives of the Sonoma Valley Fund met with more than sixty people, all of whom are intimately involved with youth issues in Sonoma Valley, including middle and high school students, parents, heads of youth-oriented nonprofits, school administrators and teachers, local experts, philanthropists and other community members.

The outcome of these discussions was the formation of a Coordinating Council for Youth Development in Sonoma (CCYDS – pronounced Kids), and the subsequent development of specific recommendations to benefit programs and activities directed at late elementary and middle school kids. By organizing CCYDS and partnering with donors and local nonprofit organizations, the Sonoma Valley Fund is strengthening its community by creating broad and lasting impact in the areas of need in the Sonoma Valley.

SONOMA VALLEY FUND BOARD

Harriet Derwingson, *President*
Peggy Bair
John Brady
Susan Cook
Whitney Evans
Tony Garcia
Thomas Haeuser
Steve Pease
George Rathman
Martha Rosenblatt
David Stollmeyer
Rick Wynne
Barbara Young

SUPPORTING ORGANIZATIONS

A supporting organization is a separate nonprofit that operates under the Community Foundation's charitable umbrella.

CHOP'S TEEN CLUB

www.chopsonline.com

SONOMA PARADISO

www.sonomaparadiso.com

PEPPERWOOD PRESERVE

www.pepperwoodpreserve.org

OLIVER RANCH FOUNDATION

www.oliverranchfoundation.org

WORKING TOGETHER

Community Foundation Sonoma County administers 450 funds, including 29 new funds opened in 2009. These serve a wide variety of charitable purposes and reflect the intent of our donors. There are many ways to become a part of the Community Foundation and make a lasting contribution to our community. To discuss opening a fund, please contact J Mullineaux, Vice President for Development, at jmullineaux@sonomacf.org or 707-579-4073, ext. 20.



1 *"The Community Foundation gives us the ability to effectively manage charitable giving to our favorite charity, the YWCA Sonoma County. It also provides us the opportunity to learn about and fund other Sonoma County organizations which align with our interests to preserve the environment and provide basic human services as well as meet other like-minded citizens."*

– Renee and Alex Amochaev

2 *"I mean what do you do with such a place? There's really only one thing to do — you give it to the community."*

– Steve H. Oliver, Oliver Ranch Foundation

3 *"As an estate planner, I have found Community Foundation Sonoma County responsive and flexible in helping my clients to realize their planning wishes. In 2009, my client R. Stuart Hummel set up a donor-advised fund so that, after his lifetime, his son William could provide ongoing support to the Sonoma Valley Historical Society and the Warren County Historical Society in Missouri."*

– Thomas A. Haeuser, Attorney at Law

4 *"Charles DeMeo's vision of a center for teens in Santa Rosa is alive and well. Chop's Teen Club is thriving with 1,116 active members, up 48% from last year. Teens come to Chop's to participate in drop-in activities and a wide array of interest-based vibrant programs."*

– Diana Curtain, Program Director, Chop's

5 *"We are grateful to Community Foundation Sonoma County for making possible the Julia Terr Fund for Ceramic Arts to further the teaching of studio pottery throughout the country in recognition of Julia's tragic untimely death."*

– Abba and Lenore Terr, Vince Colvin, Bob Cagen

6 *"As a new organization, Pepperwood Preserve's partnership with the Community Foundation helps us to find our place in the landscape of Sonoma County non-profits. The financial support and oversight we benefit from as a supporting organization was crucial to this year's success in completing and opening our new Dwight Center for Conservation Science."*

– Lisa Micheli, PhD, Executive Director, Pepperwood Foundation



OUR GRANTMAKING

GRANTS AND SCHOLARSHIPS

In 2009, \$12.9 million in grants and scholarships were awarded to 866 recipients. Since inception in 1983, the Community Foundation and its donors have awarded a total of \$128.6 million in grants.

Arts/Culture	13%	\$1,706,425
Education	7%	915,842
Environment	26%	3,334,870
Health/Human Services	48%	6,203,589
Other	6%	749,758
TOTAL	100%	\$12,910,484

DISCRETIONARY GRANTS

Discretionary grants comprise 6% of our total grantmaking (94% comes through donors and nonprofit organizations who have funds with us.) The Healdsburg Area Fund and Sonoma Valley Fund also award grants in their local areas.

GRANT CATEGORY	GRANTS TOTALING
Basic Human Needs	\$54,800
Ending Family Homelessness Initiative	\$180,000
Education	\$102,000
Environment	\$50,000
Health and Human Services	\$173,600
Arts Initiative	\$105,273
Sonoma Valley Fund	\$22,500
Healdsburg Area Fund	\$37,500

For more details on recent grants or grant application procedures, visit www.sonomacf.org. After reviewing these, please contact Robert Judd, Vice President for Programs at rjudd@sonomacf.org or 707-0579-4073, ext. 15.

2009 NEW FUNDS

Renee and Alex Amochaev Fund
Blue Wing Adobe Stabilization & Preservation Fund
Blue Wing Adobe Support Fund
Boys & Girls Clubs of Sonoma Valley Fund
for Scholarships
James D. Campisano Pancreatic Cancer
Memorial Fund
Climate Protection Campaign Fund
Fritz and Ilse Cohn Memorial Fund
COTS Fund for Preventing Hunger
Santa Rosa Dia de los Muertos
Family Justice Center of Sonoma County
Goodwill Industries of the Redwood Empire Fund
Honorable Gayle Guynup Scholarship Fund
Hummel Family Fund
La Luz Center Fund
Marcia McFarland Endowment Fund for
Animal Welfare
Marcia McFarland Endowment Fund for Foster Care
Mitchel Family Fund
Oliver Ranch Foundation Endowment Fund
Ron Rudolph Petaluma High School Athletic
Scholarship Fund
Pets Lifeline Fund
Public School Success Team Fund
Sonoma Mountain Business Cluster Fund
Sonoma Valley Fund - Funds for Scholarships
Syar Foundation Graduation Grant Fund
Julia Terr Fund for Ceramic Arts
Todd Trust Expendable Fund
Vintage House Senior Center Expendable Fund
West County Health Center Fund
Elizabeth Bock Reserve Fund of the YWCA
Sonoma County

ARTIST AWARDS PROGRAM

The annual Sonoma County Artist Awards Program directly recognizes and supports artists and their contribution to our community. One of the largest cash awards programs for artists in the state, the program is funded through an endowment at Community Foundation Sonoma County and managed by the Arts Council of Sonoma County. By acknowledging artists we affirm the value that art brings to our quality of life, economic vitality and common good. The awards raise our awareness of Sonoma County artists and the arts in our local region.

SONOMA COUNTY ARTIST AWARD RECIPIENTS

2009 PERFORMING, MUSIC AND LITERARY ARTS

Robin Beeman
Jim Corbett
John Harden

2010 EMERGING VISUAL ARTS

Tremaine De Senna
Laine Justice
Andrew Sofie

LEGACY SOCIETY

Harold Hahn and Tania Amochaev
Ellen Amsterdam-Walker
Paul and Judith Archambeau
Warren and Maile Arnold
Barbara Banke and Jess Jackson
Sharon Bard
Genevieve Barnhart
Leon Beck
Stephen A. Bessone
Fay H. Blair, CPA
Stephen V. Bohn and Monica M. Mastin
Larry and Brennie Brackett
Drew and Ellen Bradley
Libby and John Brady
Liza Weaver Brickey
Demaris Brinton and Theron O'Connor
F. James and Mary Brock
Lawrence Broderick
Sara and Dixon Browder
Barbara Brown
Blythe and Robert H. Carver
Suzanne and Doug Castino
Lee and Norma Chandler
Harvey and Janet D. Charnofsky
John and Sandy Chute
Nancy and Cole Cornelius
Theodore J. Cutler and Gemma Gallovich
Harriet and Randy Derwingson
Kathy Kent and John Dolinsek
Herb and Jane Dwight

Susan and Bruce Dzieza
Marjorie Egly
Barbara Epstein
Jeanette and Whitney Evans
Lyn Fischbein
Ed and Adrienne Flowers
Geneva Scheihing Folsom
Lisa Folsom-Ernst and Richard Ernst
Clarence Garzoli
Robert Gilchrist
Jennifer and Rick Girvin
Judith and Tom Glenn
Lois Gordon
Julia Grant
David and Michelle Green
George Greott
Thomas A. Haeuser and
Antoinette Kuhry
Paul and Jean Hammond
Paula and Albert G. Handelman
Nina and Ron Hari
Gloria A. Hattie
David Henry and Kate Burroughs
Marie C. Hicklin
Rod Jones and B.J. Cox-Jones
Robert and Linda Judd
David Karp and Jan Postma
James Kaumeyer and Roberta Solbrig
Holly and Stephen Kyle
Jim Lamb

Our Legacy Society recognizes those who have chosen the Community Foundation to provide long-term stewardship of their charitable wishes. For more information, please contact Celia Bolam, Director of Gift Planning, at cbolam@sonomacf.org, ext 23.

Lar Landa and Scott Wright
Taya Levine
Marcia and Jim Levy
John Mackie and Kate Ecker
Kay Marquet
Catherine and David Marsten
Helen B. McStravick
Sam and Betty Miller
Susan Miller
J Mullineaux and Matt Malik
Ron and Eileen Nelson
Nadenia Newkirk
Bill and Kathy Newlands
Nancy and Steve Oliver
Joyce and Steven L. Pease
Herb Polesky and Susan Lentz
Rhoann Ponseti
Joyce Remak
Edie and Craig Roland
Martha and Stephen Rosenblatt
John and Lynn Schiek
Russell and Elizabeth Schreiber
Jean Schulz
William Scogland and Douglas Heen
Ann Sebastian
June Silva

Dan Smith and Joan Marler-Smith
Daphne Smith
Doug Smith
Mitchell Soso
Carol Stout
Father Jerald Thomas
Henry Trione
Robert Tuttle
Francisco and Rosa Vazquez
Valerie Pistole and Jeffrey A. Walter
Cami Weaver
Jane and Nelson Weller
Henry and Holly Wendt
Greg Young
Gloria and Jeffrey A. Young
Gwen Zeller
Anonymous (18)

2009 ESTATE GIFTS:
Hans M. Cohn
Betty Firestone Gruberg and
Kermit H. Gruberg, MD
Marcia McFarland
Carol Cochran Schaffner
Hazel and Roland Todd

CONSOLIDATED STATEMENT OF FINANCIAL POSITION

The following is a condensed presentation of the Consolidated Statement of Financial Position, including the DeMeo Teen Club, Inc. and Sonoma Paradiso. The complete audited financial statement as prepared by Moss Adams LLP is available upon request.

¹Future Interest in Charitable Lead Trusts: The Community Foundation is the irrevocable beneficiary of several lead trusts that will contribute approximately \$8.6 million over the next 15 years. While these funds have not yet been received, they are valued in accordance with guidelines from the Financial Accounting Standards Board (FASB) at net present value.

ASSETS	2009	2008
Cash & cash equivalents	\$6,780,600	\$12,667,500
Investments	96,131,200	79,256,200
Receivables	11,872,000	807,200
Pooled income investments	234,400	310,400
Charitable lead trusts ¹	5,653,400	7,364,000
Charitable remainder trusts	1,516,600	1,314,100
Beneficial interest in trusts	8,602,600	1,291,400
Property & equipment, net	4,934,700	5,112,400
Assets held in trust	4,301,600	4,347,200
Land, permanently held	3,024,000	-
Other assets	57,800	67,700
TOTAL ASSETS	\$143,108,900	\$112,538,100
LIABILITIES		
Accounts payable	340,100	98,400
Grants payable	2,080,100	1,769,800
Due to other nonprofit organizations	21,118,000	20,372,000
Deferred compensation agreements	-	124,000
Liabilities under trust agreement	469,000	497,000
Liabilities associated with assets held in trust	4,301,600	4,347,200
Other liabilities	104,200	107,500
TOTAL LIABILITIES	28,413,000	27,315,900
NET ASSETS		
Unrestricted	32,342,200	75,420,500
Temporarily restricted	13,420,200	9,801,700
Permanently restricted	68,933,500	-
TOTAL NET ASSETS	114,695,900	85,222,200
TOTAL LIABILITIES & NET ASSETS	\$143,108,900	\$112,538,100

OUR VALUES

RESPECT

We respect the inherent worth and dignity of every person.

STEWARDSHIP

We mindfully steward the resources entrusted to us.

INTEGRITY

We honor our commitments with integrity and responsive action.

INCLUSIVENESS

We strive to engage all in the life of our community.

EXCELLENCE

We reach for excellence in all that we do.

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