



INVESTED IN THE PROMISE OF SONOMA COUNTY

COMMUNITY FOUNDATION SONOMA COUNTY

2011 ANNUAL REPORT

At Community Foundation Sonoma County,

we believe in the power of **connecting** people, ideas and resources to **improve** the **lives** of those who live here. Every day, we create partnerships with donors, organizations and community leaders to **invest** in the promise of Sonoma County.





DEAR FRIENDS

At Community Foundation Sonoma County, we believe in the power of connecting people, ideas and resources to improve the lives of those who live here. Every day we create partnerships with donors, organizations and community leaders to invest in the promise of Sonoma County. Behind all of these connections are the “connectors” who turn challenges into action and vision into legacy.

New connections are often forged through a change in circumstances. For years, the treasured parks of Sonoma County stood ready for us. When budget cuts reduced access and availability, the Sonoma County Regional Parks Foundation responded, reconnecting residents to the land while taking on new and far-reaching responsibilities. The Parks Foundation Board decided to work with the Community Foundation to assure long-term stewardship of the funds that support our parks.

Facing a different kind of change, the Blood Bank of the Redwoods successfully completed a merger to ensure the continued vitality of its operations. With the proceeds received for their assets, the Board chose to direct them to Community Foundation Sonoma County. The Blood Bank which served our county for over 60 years will now build an endowment fund for health-related initiatives, continuing a record of service in new and long-lasting ways.

Some of the most dedicated connectors are individual donors who realize that connections begin with conversations. Sam and Betz Miller, members of our Legacy Society, found that Community Foundation Sonoma County could make the right connections for their current charitable giving while also offering a path for long-term investment.

One such path is already yielding significant results, as the Hazel and Roland Todd Trust begins supporting issues of access and education in the Spring area of Sonoma Valley.

Our annual report is a salute to the connections we’ve already found and those yet to be discovered. However you choose to connect, we hope you’ll gain ideas and inspiration. What will it take to start your own story? A single conversation could make all the difference.



Barbara A. Hughes
Barbara Hughes,
President & CEO



Pete Golis
Pete Golis,
Board Chair

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ROLAND AND HAZEL TODD



Roland and Hazel Todd's relationship with Community Foundation Sonoma County began in the mid-1990s when they met with then Executive Director Kay Marquet to explore ways to benefit the community through a partnership. In 2000, the Todds decided to have the Community Foundation manage the sale of 20 acres of land and donate the proceeds to charitable causes, including the Glen Ellen Fire Department and FISH (Friends in Sonoma Helping). Our work with them at that time gave them the confidence to entrust their legacy to us.

"Hazel and Roland Todd cared deeply about the health and well-being of residents in their community, and we are honored to steward their gift by supporting such vital programs."

— Barbara Hughes, President and CEO of Community Foundation Sonoma County

After their lifetimes, the Todds' bequest instructed the Community Foundation to support charitable activities primarily in Sonoma Valley, with an emphasis on the areas of health, human services and open space. We convened a group, known as the Todd Trust Team, to assess community needs in the Valley and determine goals for use of the \$8.5 million Trust.

Based on the needs assessment and the Todds' wishes, improving the health and well-being of residents in the Springs area of Sonoma Valley became our guiding principal. "The Todds clearly wanted to provide something important and meaningful with their bequest that would positively impact the lives of people living in Sonoma Valley and, more broadly, Sonoma County," said Harriet Derwingson, immediate past President of the Sonoma Valley Fund. "This team worked to match genuine community needs with the Todds' compassionate intentions." The first two rounds of grants from the Roland and Hazel Todd Trust have now been awarded, providing increased access to essential services to the residents of Sonoma Valley. (See insert)

Community Foundation Sonoma County awarded a challenge grant of **\$100,000 to St. Joseph Health System of Sonoma County** to continue dental services to low income residents in the Springs area and more broadly in Sonoma County. The grant will help to purchase a replacement mobile dental van.

Sonoma Ecology Center received \$35,300 for assistance in creating a community garden for Spring's residents at the County's Larson Park in Agua Caliente.

\$25,000 was awarded to the **Sonoma Valley Education Foundation** for the 2012 Sonoma Valley Youth Initiative. An additional grant to this organization will close a **\$3,200** shortfall in funding a new third grade **Summer Reading Academy** being piloted at El Verano School. The Summer Academy is designed to increase reading proficiency for "rising" third graders.

A grant of **\$42,300 to United Way** will provide one year of funding to start third grade literacy competency programs in each of five Sonoma Valley elementary schools. The program is called Schools of Hope and is currently being piloted in nine schools in Sonoma, Mendocino and Del Norte counties.

The Community Foundation Sonoma County grant of **\$71,100 to La Luz Bilingual Center** will allow for the continuation of the Adult ESL instruction in the Springs that had been cancelled due to funding shortages in the school district. La Luz was also given **\$12,000** to provide **emergency rental assistance** for low income Sonoma Valley residents in crisis.

IN REMEMBRANCE



Michael Friedenberg
1954-2011



Barbara Walter
1931-2010



Harold Hahn
1940-2011



Claire Davis
1912-2010



Geneva Scheihing Folsom
1922-2012

SONOMA COUNTY REGIONAL PARKS FOUNDATION

Where can a nonprofit board invest funds for the long-term to increase interest income while ensuring that its money will be managed by prudent investment professionals? This was the question facing the board of directors of the Sonoma County Regional Parks Foundation, the nonprofit that supports Sonoma County Regional Parks. In 2011, the Parks Foundation board carefully reviewed a variety of investment options, including several private investment advisors and Community Foundation Sonoma County. Ultimately, the board determined that the Community Foundation represented the best option to establish three funds: a Parks Foundation endowment, an endowment for the Elizabeth Anne Perrone Dog Park in Sonoma Valley, and a fund for a proposed new park.

"Our board considered it essential to entrust our assets to advisors who would invest our donors' contributions conservatively," explained Melissa Kelley, executive director of the Parks Foundation. "With several hundred thousand dollars in our accounts, we recognized the need to earn more than a meager 0.5% on our investment – which had been our previous rate of interest."

Investing with the Community Foundation Sonoma County occurred at a critical time. Core financial support from the County's general fund for Sonoma County Regional Parks has declined significantly in recent years. At the same time, Regional Parks' responsibilities have increased, particularly with the added responsibility for operating Annadel State Park.

Parks Foundation staff, board members and volunteers are working harder than ever to bolster the Foundation's fundraising. Coincident with transferring funds to the Community Foundation and rising to meet the heightened challenges of our Regional Parks, the Parks Foundation launched exciting new programs, events and awareness campaigns. Earning a higher return on secured funds is a key component of the Parks Foundation's renewed efforts.

The new partnership between the Community Foundation and the Sonoma County Regional Parks Foundation is thriving. In fact, this year the Parks Foundation received a bequest of \$25,000 to establish an endowment for the Children's Memorial Grove at Spring Lake Park. Parks Foundation board members knew immediately that they wanted to entrust the new endowment to the Community Foundation Sonoma County.

"We were delighted to work with the Board of the Sonoma County Regional Parks Foundation as they sought prudent and professional management of their invested funds. Sonoma County residents are fortunate to have such thoughtful leaders supporting our treasured parks."

– Barbara Hughes
President and CEO of Community Foundation Sonoma County



Photo Credit: Courtesy of Jay Blackburn



Photo Credit: Courtesy of Tom Reynolds

BLOOD BANK OF THE REDWOODS LEGACY FUNDS

Dramatic changes in regional health care over the last decade made developing a strategy for the future delivery of blood services one of the highest priorities for the Blood Bank of the Redwoods (BBR) Board of Directors in 2011. As stewards of the community blood center, the Directors began to search for blood services that would be sustainable through the next several decades of health care change—change such as escalating costs and consolidation of hospitals. The intent was to find an organization that could seamlessly take over services, had familiarity with the region, had long-term viability and would dedicate itself to BBR's donors, patients and hospitals. The Board of Directors chose Blood Centers of the Pacific (BCP) to do just that.

The merger of BBR and BCP resulted in funding available to continue the BBR legacy. The next step was to structure endowments that would provide ongoing support to the communities that BBR had served for more than 60 years. Partnerships with two community foundations proved to be the strongest solution for the necessary investing and granting of the funds. Community Foundation Sonoma County and the Community Foundation of Mendocino County are now the stewards of the endowments in their respective counties. Community representatives and Blood Centers of the Pacific will review and recommend grants to be distributed, in the name of Blood Bank of the Redwoods, to qualified local projects and programs.

These organizations have come together to invest in the future of the community and are to be congratulated for the thoughtful way in which they transitioned their vital local organization," said Pete Golis, Community Foundation Sonoma County Board Chair. "We are grateful to help them carry on the tradition of service."

LEARN TO FISH

Santa Rosa residents Sam and Betz Miller never thought of themselves as philanthropists. "We are not wealthy, and even though we give a good percentage of our income to charity, my thinking was that philanthropists were people who could write big checks and be on the boards of good causes," says Sam. But that opinion has changed for the Millers, thanks in large part to their work with Community Foundation Sonoma County.

"Through our conversations with Foundation staff, we have become more focused in our giving. We want to support causes that help people so that they won't need help in the future—causes that help people 'learn to fish.' Through the Community Foundation, we have been able to meet with organizations that are most likely to give measurable results, so that we know our giving is making a difference and that people who are in need now can be given skills or a boost so that they can become more self-reliant, even if they still need help from time to time. The Foundation has helped us with our current and future charitable goals to make Sonoma County a better place to live."

Sam and Betz had been aware of the Community Foundation for some time. Family friends had worked with the Foundation on their legacy plan, and the Millers were interested in doing the same. With no children and few family members to consider in their estate planning, Sam and Betz decided, in consultation with their attorney, that the Community Foundation would be a wise partner for their legacy planning. "Foundation staff was able to give us ideas on how to focus our giving so that even when we are both gone, our charitable goals will be met. The Community Foundation will make sure that the goals we set will guide them in providing support to those nonprofits whose missions and priorities match ours."

With a legacy plan in place, the Millers found the Community Foundation could assist them in their current giving as well. They established a donor-advised fund and began to take advantage of Foundation events designed to help bring donors focus around their giving as well as provide them with information and knowledge about the charitable work being done in the community.

IN REMEMBRANCE

Herbert F. Polesky, 1933-2011

Herbert Polesky often joked that his career was defined by two red fluids, blood and wine. An internationally recognized expert in blood banking and transfusion medicine, he embarked upon a second vocation as a California winegrape grower when he and his wife Susan Lentz purchased property near Healdsburg in 1989. As much as he loved his home and vineyards in Dry Creek Valley, he was also a world traveler. He leaves a legacy of dedication to excellence and to advancing opportunity for all persons, especially opportunity for access to quality health care.



IN YOUR NEIGHBORHOOD

"Community Foundation Sonoma County created the Neighborhood Grants Program to provide community residents the resources to address and solve problems in their own neighborhoods. We believe that residents have the capacity and the desire to gather together to address issues of importance to families in these communities. We hope that residents will be inspired to bring the skills and relationships they formed in their neighborhoods to the broader community and that the perceived differences of ethnicity, gender, and economics that often appear to divide communities will be overcome through the common experience of working together."

– Herb Castillo, Community Foundation Board Member



Photo Credit: Sunrise Community Garden

SUNRISE COMMUNITY GARDEN

Sunrise Community Garden in Petaluma was awarded \$2,000 to bring fresh, organic food to the community. Bridging income, language, age and cultural differences, Sunrise Community Garden is a model project for community building, greatly increasing positive interactions between disparate sections of the neighborhood. When the garden is complete, it will offer 20 organic beds and a small orchard to produce healthy food at minimal cost for both the plot holders and the local community.

"The Neighborhood Grant was directly responsible for the garden opening on time, which improved relationships all around. It also enabled the garden membership to move forward with additional important projects and encouraged us to research and apply for other grants. We hope that the garden will be self-sufficient financially within the first year."

– June Geron, Sunrise Community Garden

LOBO UNITY

Elsie Allen High School's Lobo Unity is a grassroots effort whose mission is to strengthen community relationships with the neighbors around the High School. The Lobo Unity CommUnity Fair was launched in 2008, with 1,500 participants and 60 booths, to create strong neighborhood connections. In 2012, Lobo Unity committed to engaging the youngest members of the community, with the \$900 Community Foundation Neighborhood Grant supporting the participation of the Children's Museum.

"Writing this grant allowed the students of Lobo Unity to become aware of the entire grant process. This process held them to deadlines and budget constraints much different than their daily school assignments. Lobo Unity felt a sense of accomplishment knowing their motivation to create a quality family event was not hindered by school budget cutbacks and that with time and research, other avenues of support could ensure another successful fair."

– Lisa DeCarbo, Lobo Unity Director

WINDSOR BLOCO

Windsor Bloco received \$2,000 in funding to purchase drum mallets, drum heads and a sound system for a youth drum and dance after-school program. This group has been together for twelve years with a fundamental objective being youth leadership development. Young people are given opportunities to set goals for the group, lead discussions and provide peer support. The Windsor Bloco program strives to reach students, give them a sense of belonging and keep them active in and out of school.



Photo Credit: Lobo Unity

COMMUNITY FOUNDATION AFFILIATES

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SONOMA VALLEY FUND

In 2011, Sonoma Valley Fund celebrated its fifth anniversary. This affiliate's mission is to promote and facilitate local philanthropy and legacy giving by serving as a bridge between nonprofits, estate-planning professionals and donors. No other organization unites all constituencies around the purpose of endowing the Sonoma Valley community as a whole.

Since its founding in 2007, Sonoma Valley Fund has directly awarded \$263,000 in grants and scholarships to local nonprofits and individuals. Community Foundation Sonoma County has helped direct an additional \$842,000 in the valley for a combined total of more than \$1.1 million.

Sonoma Valley Legacy Circle

In 2011 Sonoma Valley Fund launched the Legacy Circle, an honorary society of those in the valley who have made a commitment to charitable planned giving. As of January 2012, 160 individuals and families have joined the Circle.

Endow Sonoma Valley Month

The Sonoma City Council and Sonoma County Board of Supervisors proclaimed October 2012 as "Endow Sonoma Valley Month." Sonoma Valley Fund will hold a series of free public seminars and panel discussions designed to dramatically increase the number of residents who include Sonoma Valley charities in their estate plans.

Youth Initiative Takes Flight

In 2009 Sonoma Valley Fund launched the Youth Initiative, incubating a series of summer and after-school enrichment programs to help at-risk children transition smoothly from elementary to middle school, and from middle school to high school. After successfully serving some 500 students over two years, we transferred operations to the Sonoma Valley Unified School District with an appeal to the community to help sustain the initiative's valuable work.

George and Phyllis Ellman Grants

In 2011 the Sonoma Valley Fund awarded \$63,000 in grants through our stewardship of the George and Phyllis Ellman Fund, which we have administered since 2008.

THE HEALDSBURG AREA

This past year the Healdsburg Affiliate experienced its highest level of donations and grants in a single year since its inception in 2003. Inspired by a \$100,000 matching donation challenge, the Board was successful in more than doubling that amount to increase the Healdsburg Endowment by \$210,000. **The matching gift ultimately increased the Endowment to over \$1 million.**

It was a record setting year for grants as well. The largest number of grant requests to date translated into 14 awards to nonprofit agencies in Healdsburg and Geyserville. The Endowment disbursed **\$65,000** to worthy organizations doing important work in the areas of health, education, human services, youth programs and the arts. The Healdsburg Area Grants Committee uses a rigorous and thorough process for considering applications, including site visits to each nonprofit under consideration.

Grantees this year included the Alexander Valley School Parents' Club, Alliance Medical Center, Becoming Independent, Boys' and Girls' Club of Geyserville, California Human Development, Community Child Care Council, Farm to Pantry, Healdsburg Center for the Arts, Healdsburg Education Foundation, Healdsburg Jazz Festival, Literary Arts Council Bookmobile, Public School Success Team, Redwood Empire Food Bank, and Social Advocates for Youth.

The Affiliate also partnered with the Healdsburg Farmers' Market to increase access to healthy and nutritious produce through the CalFresh program. Board members volunteered at weekend Farmers' Markets collecting donations from market patrons that doubled the amount available to CalFresh program participants when they used their EBT cards at the Market. This effort raised awareness of the need for all members of the community to be able to purchase healthy food.

HEALDSBURG AREA BOARD

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OUR GRANTMAKING

The Quetzalen Folk Ballet Group

in the Springs area of Sonoma Valley was awarded a \$2,000 Neighborhood Grant to buy costumes for the youngest dancers and enabled them to participate in the performances. Dance classes and events for adults and children bring families together to learn about the dances' history, practice, perform and share their cultural pride with each other and many other communities.

GRANTS AND SCHOLARSHIPS

Health & Human Services	48%	\$3,930,700
Education	18%	\$1,505,100
Arts & Culture	15%	\$1,208,100
Environment	12%	\$1,012,600
Scholarships	3%	\$225,600
Other	4%	\$346,900
TOTAL	100%	\$8,229,000

For more detailed information on recent grants or grant application procedures visit www.sonomacf.org.

SUPPORTING ORGANIZATIONS

Chop's Teen Club
www.chopsonline.com

Oliver Ranch Foundation
www.oliverranchfoundation.org

Pepperwood Preserve
www.pepperwoodpreserve.org

Sonoma Paradiso
www.sonomaparadiso.com

2011 NEW FUNDS

Blood Bank of the Redwoods Legacy Fund
The CABSLY Fund
Ella Bisbee Fund
Friends in Sonoma Helping (F.I.S.H) Fund
First 5 Sonoma County Fund for Preschool Scholarships
Friends of the Sonoma Valley Library Fund
Gloria Hannon LandPaths Shared Backyard Assistance Fund
The Literacyworks Fund
Mark West Creek Park Fund
Bob and Wilma Milby Fund
North Bay Cancer Alliance – Virginia M. Hoffman Memorial Fund
Polesky Memorial Fund for Healthcare
Elizabeth Anne Perrone Dog Park Endowment Fund
Sonoma County Regional Parks Foundation Endowment Fund
The Stolane Fund

2011 ANNUAL EVENT SPONSORS

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Nelson Family of Companies

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Ledson Winery & Vineyards
Manatt, Phelps & Phillips LLP
O'Brien, Watters & Davis LLP
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LEGACY SOCIETY

Our Legacy Society recognizes those who have chosen the Community Foundation to provide long-term stewardship of their charitable wishes.

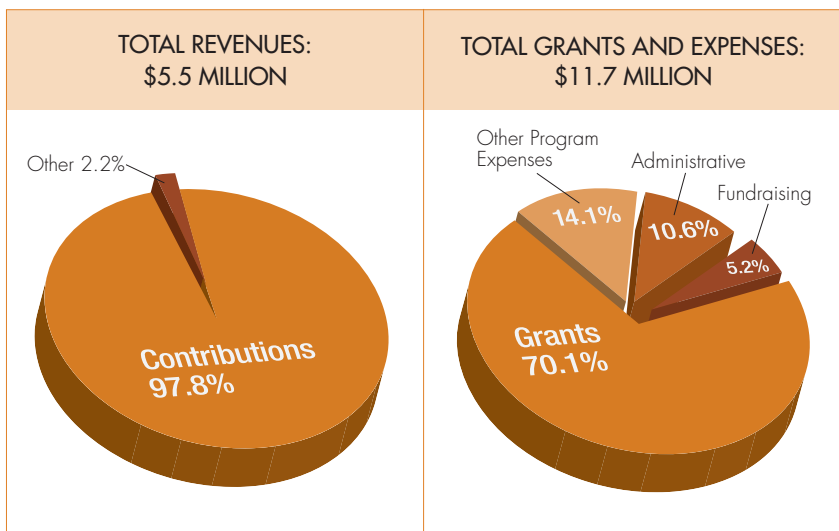
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Henry and Holly Wendt
Greg Young
Gloria and Jeffrey A. Young
Gwen Zeller
Anonymous (19)

FINANCIAL SUMMARY



ASSETS	2010	2011
Cash and cash equivalents	2,315,100	1,692,600
Contributions receivable	11,434,800	11,859,700
Investments	100,985,000	98,746,200
Charitable trust assets	24,198,400	21,659,600
Other	13,250,500	12,574,000
TOTAL ASSETS	152,183,800	146,532,100
LIABILITIES AND NET ASSETS		
Agency funds	13,068,500	14,249,800
Other liabilities	7,080,600	6,514,200
TOTAL LIABILITIES	20,149,100	20,764,000
NET ASSETS	132,034,700	125,768,100
TOTAL LIABILITIES AND NET ASSETS	152,183,800	146,532,100

Audited financial statements are available at www.sonomacf.org.

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Retired, Neonatal Nurse

**Joined in 2012*

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.

COMMUNITY FOUNDATION SONOMA COUNTY

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