





At Community Foundation Sonoma County, we believe in the power of connecting people, ideas and resources to benefit 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,

It is our pleasure to share with you the Community Foundation’s 2012 annual report which highlights stories of generosity and impact, two of the values that unite our community of donors, nonprofits, community leaders, and all of the people of Sonoma County who have chosen this place to call home.

Last year, the Community Foundation distributed over **\$10 million in grants** on behalf of our generous donors. As you will read in the pages that follow, these funds went to organizations across all corners of the county and beyond, from the Community Child Care Council, to Sutter Medical Foundation, Farm to Pantry, and the Mr. Music Foundation. We also partnered with the Redwood Empire Food Bank with a grant that helped over 160 agencies to receive fresh food at no charge and to distribute over two million pounds of produce to those in need. And we saw Chops Teen Center expand its workforce development programming and launch Jobs Made Real, a website designed to aid teens in discovering their career paths.

This year marks the **30th anniversary of Community Foundation Sonoma County**. It took the great vision of a band of community leaders, spearheaded by Jean Schulz, to create an organization that would hold a long-term vision for the county. On behalf of its donors over the past 30 years, the Community Foundation has granted over \$125 million to benefit our community. Those leaders from 1983 had the right combination of passion, innovation, resources, and tenacity to create an organization that would inspire others to join this movement of growing the county’s philanthropic giving and impact.

As we look to the next 30 years, we know that while both the challenges and opportunities our community faces may shift, we will hold stead-fast to this collective dream—to make sure the children and grandchildren of our county have opportunities to thrive here, and have the chance to become happy, healthy, educated, and employed adults who, like you, will also give back their time, treasure, and talent to this community they hold dear.

We are so blessed to be living in one of the most beautiful places on earth and to have a community so deeply dedicated to philanthropy. Thank you for the honor of being our partners in growing philanthropy in Sonoma County.



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Image Credits: Cover (clockwise): Nancy and Dale Dougherty; Laura Alice Watt (vines); Mike and Suzy Marzalek, photo by Jesse Irizary; Laura Alice Watt (Bodega ocean); Marc Felton; iStockPhoto; Laura Alice Watt (farm). Inside and Back Cover: Laura Alice Watt

Annual Report Editor: Celia Bolam Creative Design: SunDesign Studios

NANCY AND DALE DOUGHERTY

Dale and Nancy first connected with Community Foundation Sonoma County through a giving circle they helped form in the fall of 2000. The twelve members shared concern over the decline in public education and the escalation of school violence. They were interested in pooling resources for giving based on new venture philanthropy models being tried out around the country. Community Foundation staff came to speak with the group about trends in the giving field and continued to support their work to create a funding plan.

The giving circle's goal was to strengthen the counseling services for the three Sonoma County High Schools by ensuring that a therapeutic counselor was present on campus for students every school day. This was the only focus initially, but over time, the group, the **Teen Counseling Project of Sonoma County**, became much more. Working closely with the West County Union High School District, they developed a Speakers Series for the 9th Grade Health Curriculum, an Intern Program, and a Film Series for parents and students. The Teen Counseling Project developed into its own hybrid of advocacy group and social service agency, all the while under the guidance of very involved Community Foundation staff.

For the last few years, Nancy has also been working with the Center for Creative Arts, which runs art programs to foster personal growth and expression for underserved populations. An art therapist who leads a group of women at *The Living Room* observes how the art-making process increases their self-esteem and resourcefulness. Another art therapist at *The Children's Village* has the children visualize their lives, creating Wishing Bracelets to honor their dreams and Trees of Love to teach them how to love themselves. She observes how the children show greater expressions of empathy and happiness in response to their art projects.

Dale's work as founder and publisher of **Make** and the creator of **Maker Faire** opened up new ways for the couple to impact education. Nancy and Dale support hands-on experiential learning that engages students, particularly those poorly served by traditional academic approaches. In 2010, Dale launched a pilot Make class at Anal High School and a summer Maker Camp at Comstock Middle School. More than half of the grants awarded from the Dougherty's donor-advised fund have gone to school-related purposes, primarily supporting programs that encourage students to develop new skills and creativity.



Community Foundation Sonoma County is proud to partner with the Doughertys and support their thoughtful innovative investments in our community.

SCHOLARSHIP SONOMA COUNTY

Long-time community volunteers **Mike and Suzy Marzalek** both retired from Agilent Technologies and immediately immersed themselves in a number of education and social justice initiatives that advance their personal philanthropic mission. Mike, an engineer, was the first in his family to graduate from college. Promoting exposure and access to higher education, and the economic opportunities that come with higher education, are central themes in the couple's volunteer interests and philanthropy. With that in mind, Mike and Suzy established the **Mike and Suzy Marzalek Scholarship** with **Scholarship Sonoma County** to grant post-secondary school scholarships to highly motivated, financially disadvantaged graduates of Roseland University Prep who will be continuing on to college, technical or trade school.



Photo Credit: Jesse Irizary

MARY AND MARC FELTON

Mary and Marc Felton moved to Sonoma County in 2006. Marc had a career in high tech in the Bay Area and Mary is a former nurse. They started their own family foundation in 2005. **In 2008 they came to the Community Foundation to learn more about local philanthropic activities and community needs.** Later that year they helped fund a riparian restoration project on the Adobe Creek.

Marc is a third generation Californian who grew up in Monterey. As a high school exchange student in Japan he walked among rice paddies and saw how space could be used to its full potential sustainably for thousands of years. In 2011 the Feltons started a **Certified Naturally Grown farm** in West County. Marc decided to start the farm when the Sacramento River fall king salmon run dwindled to 5% of its usual population and his dream of operating a salmon charter fishing vessel evaporated.

In 2012, the Feltons moved their family foundation to Community Foundation Sonoma County because they wanted to focus on giving but not necessarily on the responsibility of administering and managing a private foundation. One of their favorite philanthropic services is conducting their grantmaking online, which has really simplified their giving and saved them valuable time.



"I hope to produce food that is at least in some ways similar in nutritional quality and depth of flavor to that most noble California resource: the wild king salmon."

— MARC FELTON

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SONOMA VALLEY FUND

In 2012 Sonoma Valley Fund launched the first ever **Endow Sonoma Valley Month**. The goals of this month-long series of events were to increase awareness of legacy giving and to encourage more people to make a charitable legacy gift commitment. Sonoma Valley Fund sponsored six events aimed at increasing awareness, education and action. More than 500 people attended, and the number of legacy donors doubled over the year.

Grantmaking from Sonoma Valley Fund, and Community Foundation Sonoma County, into the Valley increased dramatically this year. Over **\$414,000** was granted to nonprofits serving Sonoma Valley. Since Sonoma Valley Fund’s inception in 2007, the Community Foundation and Sonoma Valley Fund have directed a combined total of more than \$1.65 million in grants to the Valley.

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THE HEALDSBURG AREA

In 2012, Community Foundation Sonoma County Healdsburg Area continued its tradition of community support with **another record year of grantmaking**, awarding **\$65,500** to twelve agencies providing services in Healdsburg and Geyserville. At a community celebration sponsored by Seghesio Winery and Agave Restaurant, we honored the work of these Area agencies and thanked our donors for their ongoing support.

Taya Levine, Chair of the Healdsburg Area Affiliate Board, remarked on the broad array of services provided by this year’s grantees.

BOARD MEMBERS EMERITUS

Richard Burg
Lee Chandler

2012-2013 HEALDSBURG AREA GRANTEES

Becoming Independent
Community Child Care Council
Farm to Pantry
Geyserville Educational Foundation
and Geyserville Unified School District
Healdsburg Education Foundation
Healdsburg Jazz Festival

H-Town Youth Theatre
Free Bookmobile of Sonoma County
Psst!
Redwood Empire Food Bank
Russian Riverkeeper
Sutter Medical Foundation

The money behind these grants derives from a variety of funds managed by Community Foundation Sonoma County. Almost \$300,000 represented initial grants from the Todd Trust, an \$8.5 million bequest from Roland and Hazel Todd left to benefit nonprofit organizations primarily in Sonoma Valley. Another \$120,000 was distributed to Sonoma Valley nonprofit organizations based on Community Foundation Sonoma County’s overall discretionary grantmaking processes. Some \$29,000 represented final grants from the Ellman Fund, a gift from Phyllis and George Ellman awarded over five years and targeted at Valley non-profits

The results in 2012 represent only the beginning of Sonoma Valley Fund’s efforts to help sustain and improve the Valley’s unique socioeconomic, environmental, and cultural qualities for generations to come.

“Programs and projects, from education, to the arts, to the environment, to assisting people with disabilities, to providing support for breast cancer patients, to local access to our county bookmobile! Healdsburg and Geyserville are well served by the organizations receiving grants this year, and we are honored to play a part in their ongoing support to our communities.”

In its nearly ten year history, the Community Foundation in Healdsburg has granted over \$350,000 to 32 organizations in Healdsburg and Geyserville and the Healdsburg Area endowment stewards over a million dollars.

HOW CAN WE ELEVATE THE ARTS IN SONOMA COUNTY?



Chop’s Teen Club Member Melody Kang

How can we elevate the arts in Sonoma County?
The arts stretch our imaginations and animate our connection to community. Recognizing that the arts sector faces complex issues that are greater than the resources currently available, Community Foundation Sonoma County gathered a diverse group of stakeholders to answer the question, “How can we elevate the arts in Sonoma County?”

Over the course of four facilitated work sessions, 66 people came together to deepen our understanding and provide insight into how we might work together. While the agenda remained consistent, the session participants were different, allowing for robust, cross-sector solutions.

Current factors influencing the arts in Sonoma County:

- The popularity of participatory art making
- Inequities in access to arts education
- The absence of a countywide cultural arts plan

What are our priorities for elevating the arts?

Across all four convening participants identified countywide promotion of the arts, establishing strong leadership, enhancing arts education and cooperating across sectors.

Now the real challenge: moving from ideas to action

Community Foundation Sonoma County is committed to arts grant making that includes community feedback and is based on research driven best-practices. Therefore, our approaches include:

- **Arts Education:** We support increasing equitable access to a high quality arts education for underserved youth in Sonoma County.
- **Artist Support:** We support the growth and exposure of Sonoma County’s emerging artists.
- **Expanding Engagement:** We invest in artists and arts organizations to diversify and deepen participation in the arts among new audiences

We are steadfast in our role as convener and advocate, joining with others in exploration and implementation. We invite you to stay connected, stay engaged and stay focused on a vibrant future for the arts.

EXAMPLES OF ARTS GRANTS

California Poets in the Schools work closely with classroom teachers to grow young people’s creativity and intellectual curiosity through the poetry-writing process.

Mr. Music Foundation brings professional musicians into K-6 classrooms, providing ear training, singing, rhythm and movement, which also includes Spanish language and cross-cultural awareness.

Wells Fargo Center for the Arts Artists-in-Schools program integrates the arts into classrooms, providing dynamic, hands-on learning that accentuates lessons in math, science, language arts, and social studies.

COMMUNITY ORGANIZING

As an important part of our process for making grants from the Hazel and Roland Todd Trust Fund, Community Foundation Sonoma County employed two community organizers from the **North Bay Organizing Project** to build relationships with residents in very low income communities in the Springs area of Sonoma Valley. Our goal: to help overcome cultural and language barriers to accessing health services. We knew from our conversations with Valley residents how important it was to increase services in the Springs, but we wanted to hear directly from Springs residents about their priorities so the legacy gift left by Hazel and Roland Todd can have the most impact.

Community organizing is a step by step process of building relationships of trust with residents and encouraging their development as leaders. In that process, residents have come to better understand how they can voice their ideas for making the Springs a better place to live. It has taken a year for the community building process to reach the point where residents are now convening their own public meetings, asking questions of the organizations that serve them and working out agreements with those providers on what can be done.

There is a growing sense of community pride within the Springs and excitement among residents that their voices are being heard.

CORPORATE CIRCLE

- Burr Pilger Mayer
- Carle Mackie Power & Ross LLP
- Clement Fitzpatrick & Kenworthy Exchange Bank
- Frank Howard Allen Realtors
- Manatt Phelps & Phillips
- Simons & Woodard Inc.
- Spaulding McCullough & Tansil LLP
- Summit State Bank
- Willow Creek Wealth Management
- Zainer Rinehart Clarke

CHOP’S TEEN CLUB

2012 was a year of growth for Chop’s Teen Club. In addition to providing over **800 teens** with an engaging and productive place to spend their time, Chop’s saw significant expansion in their leadership and workforce programs, including the following:

- Work Ready Certification in partnership with the Sonoma County Office of Education, Digital Video Making, Photoshop, Leadership Facilitator Training, Culinary and Barista Training, and Basic Food Handler Certification.
- Financial literacy programs in partnership with Sonoma County Office of Education and Redwood Credit Union
- Cooking with Kids Foundation awarded an **Awesome Pretzel Cart** to provide entrepreneurial and business skills
- Youth Empowerment & Leadership Conference attended by 180 middle school students
- Developed Youth Empowerment Council in partnership with Tomorrow’s Leaders Today
- Developed new interactive career exploration website, **www.jobsmadereal.com**
- Developed volunteer program with 60 new volunteers including a partnership with Sonoma State University with 15 SSU students volunteering for the tutoring and homework help program

For some teens, the interaction they had with the Chop’s staff mentors was the most in depth and meaningful adult interaction they received each day. Membership represents a diverse mix of Santa Rosa teens in grades 7-12 who pay a minimum of \$1.00 per year to join. **In 2012 Chop’s received 65% of their annual revenue from the DeMeo Fund, held at Community Foundation Sonoma County. The other 35% came from fundraising efforts and fees, representing a diversified revenue mix.**

Chop’s Teen Club is indeed a valuable asset to our community and in recognition of this, the Sonoma County Board of Supervisors awarded Chop’s with a prestigious **Jefferson Award for Excellence in Community Leadership and Civic Engagement.**

GRANTS AND SCHOLARSHIPS

Health & Human Services	33%	\$3,311,600
Arts & Culture	30%	\$2,949,700
Education	21%	\$2,048,100
Environment	10%	\$964,600
Scholarships	2%	\$208,500
Other	5%	\$491,000

TOTAL 100% \$9,973,500*

*For more detailed information on recent grants or grant application procedures visit www.sonomacsf.org.
This figure does not include grants to agency funds.

2012 NEW FUNDS

- Lucille K. Baker Fund for Arts, Basic Needs, Environment and Education
- Lucille K. Baker Fund for Elementary Schools
- The Burleson Fried Family Fund
- Marc and Mary Felton Funds
- The Fitch Mountain Fund
- Paul Hobbs Winery Fund
- Donna Holloway Endowment Fund for Chop’s
- LandPaths Bohemian Ranch Fund
- LandPaths Grove of Old Trees Fund
- The Henry and Doris Matteri Endowment Fund
- The Mickey Smith Scholarship Fund
- Susan Miller Fund for HIV/AIDS Services
- Herbert F. Polesky Memorial Fund
- Redwood Credit Union Community Fund
- Rykken Scull LGBT Memorial Fund
- The Sangiacomo Family Fund
- Geneva Scheihing Ed.D. Fund for the ACLU Foundation
- Geneva Scheihing Folsom Ed.D. Fund for Becoming Independent
- Geneva Scheihing Ed.D. Fund for Friends of the Sebastopol Library
- Geneva Scheihing Ed.D. Fund for Public Citizen Foundation
- Geneva Scheihing Ed.D. Fund for Southern Poverty Law Center
- Geneva Scheihing Ed.D. Native American Fund for Scholarships
- The Seeds of Learning Endowment Fund
- Jim and Sandy Shelton Fund
- Sonoma County CTE Fund
- Sonoma Endeavor Fund
- Stewards of the Coast and Redwoods Endowment Fund
- The Sweetwater Spectrum Fund
- Trione Family Fund
- Barbara and Robert H. Walter Memorial Fund

SUPPORTING ORGANIZATIONS

- | | |
|--|--|
| Chop's Teen Club
www.chopsonline.com | Pepperwood Preserve
www.pepperwoodpreserve.org |
| Oliver Ranch Foundation
www.oliverranchfoundation.org | Sonoma Paradiso
www.sonomaparadiso.com |

RON CASENTINI



Jake Longstreth, “Small Town In-Grown”, acrylic on canvas

At a young age, Ron Casentini discovered the wonders of the Fine Arts Museums of San Francisco. He credits his family for teaching and encouraging him to appreciate the arts very early in his life. All of the collections fascinated him as a child, but the Egyptian section of the De Young Museum particularly grabbed his interest. His first acquisition was a mortar and pestle from ancient Egypt – and he still owns it!

Today, Ron’s contributions to the art world range from collector to speaker, to supporter to educator. As his art collection has grown, so has his interest in the artists themselves. Understanding a piece of artwork as an expression of an individual's experience made Ron see cultural arts as a valuable tool to personal development. Just as his young life had been so positively impacted by art and creativity, he wanted more young people to have access to art and art education. In 2000, he established a foundation to support that mission.

In 2012, Ron decided to revise his estate plan to entrust the Community Foundation with one of his life’s goals: to **support the arts program for youth**, in particular. After Ron’s lifetime, Community Foundation Sonoma County will continue to award grants in his name to benefit the arts, artists and arts education in this county.

FINANCIAL SUMMARY



Total Revenues \$19.9M

- Contributions 52.1%
- Net Investment Return 41.5%
- Other 6.4%



Total Grants and Expenses \$13.3M

- Grants 75.1%
- Other Program Expenses 12.7%
- Administrative Expenses 7.2%
- Fundraising Expenses 5.0%

ASSETS	2011	2012
Cash and Cash Equivalents	1,692,600	1,425,400
Contributions Receivable	11,859,700	12,067,800
Investments	98,746,200	107,791,100
Charitable Trust Assets	21,659,600	19,638,300
Other	12,574,000	12,594,000
Total Assets	146,532,100	153,516,600

LIABILITIES AND NET ASSETS		
Agency Funds	14,249,800	16,335,700
Other Liabilities	6,514,200	6,707,200
Total Liabilities	20,764,000	23,042,900
Net Assets	125,768,100	130,473,700
Total Liabilities and Net Assets	146,532,100	153,516,600

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

LEGACY SOCIETY

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

Beth and Joseph Aaron
Tania Amochaev
Ellen Amsterdam-Walker and Donald Walker
Paul and Judith Archambeau
Warren and Maile Arnold
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