OUR MISSION

At Community Foundation Sonoma County, we believe in the power of connecting people, ideas, and resources to benefit all who live here.

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The 2017 fires have changed so many things about our beloved Sonoma County, from seeing friends and neighbors displaced by the fires, to families making the hard choice to move away rather than to rebuild. Our recovery is defined by both loss and hope.

Today, we are buoyed by the incredible generosity shown to our community, and by the pace of homes being rebuilt—62% of the homes we lost are in the process of being rebuilt and normal construction quiet zones rules have been waived in Coffey Park and Fountaingrove to accommodate the joyfully chaotic sounds of building crews pouring foundations and putting finishing touches on new homes.

And yet, the after effects of the fire remain, especially so for those members of our community who were already struggling before the disaster. Nonprofit organizations that sprang into action after the fires report that they are struggling to keep up with new levels of demand for their services.

For example, Corazón Healdsburg opened a disaster-relief free store after the fires, distributing over $750,000 worth of new and used goods to 2,500 families in just two months. Today, their client roster of families seeking ongoing support has tripled. Buckelew Programs saw a more than 50% increase in services and has added fire-specific support groups each month to help their clients cope with trauma and stress. The Redwood Empire Food Bank’s Groceries to Go client list has jumped from 2,700 households per month before the fires to 9,200 households today as families struggle to afford the increased rental costs and put food on their tables.

These nonprofit organizations, and so many more, were able to immediately launch into action to take care of our community—a testament to the strength, generosity and resiliency that makes Sonoma County so special. As philanthropists, our call to action is equally clear—we are called to ensure that these vitally needed service providers are able to continue to support those in our community who need help.

Immediately after the fires, we launched the Resilience Fund, dedicated to long-term recovery with a focus on three areas: Helping individual fire survivors, Healing community trauma, and Housing solutions. We are honored to have made
over $3.8 million in grants to nonprofit organizations since the fires broke out.

As we get deeper into this work of community resilience, we have realized that we need to assure that the organizations themselves are also resilient enough to recover from the 2017 wildfires and prepare for—unfortunately what is likely to be—the next one. We are pleased to partner with the Hewlett Foundation this summer to launch a new program we are calling the Resilient Leaders Collaborative—a capacity building grantmaking program aimed at supporting nonprofit organizations to become more resilient in the face of disaster.

Our annual report this year focuses on our community’s resilience and capacity in its many forms—from supporting nonprofit leaders to work and learn together, to highlighting the philanthropists whose generosity makes this work possible.

Since Community Foundation Sonoma County was founded 36 years ago, our donors have supported $225 million in grants to nonprofit organizations, with more than $13.5 million granted out just last year. We are honored to count you as a partner in this legacy of giving, a co-creator of our community’s Resilience.

Deberah Kelley  
Board Chair  

Elizabeth Brown  
President and CEO
Michael Calvelli walks into the courtyard at Friends House with a smile for every person he meets along the way. A long-time member of the Friends House board of directors, Michael jokes that he was surprised to have been recognized in a suit, when he so often visits the nonprofit retirement community in more casual attire. It’s clear that his commitment to the Friends House community goes beyond attending monthly board meetings and into the personal relationships he has built along the way.

As a professional wealth advisor, Michael serves multiple clients who have funds with Community Foundation. He offers his clients financial planning, investment portfolio design, asset management, retirement planning services, and philanthropic referrals, but most often, Michael offers his clients a friendly ear. “I remember that when I first got started I had a little sticky note that just said, ‘listen’ because I would catch myself being in that old financial world where it was just about the numbers and reports,” Michael said. “Many of my clients today are looking for somebody in their life to share with them their financial part of it, a safe place to talk about something they don’t talk to most people about.”
Developing deeper relationships with his clients is an honor, and a marked change from Michael’s early years in finance. He launched his career in New York City, working as an investment banker starting in the 1980s, before moving to Marin County and working in San Francisco—a lifestyle that meant he was often away from home, flying between San Francisco and New York. Michael loved his work but craved a change. “Somewhere in the 2006-2008 financial crisis, I said ‘I can’t do this anymore’: I need to go out and do something good for somebody.”

He met Judy Withee at a fortuitous moment during that time. Judy—having run a successful private financial advisor practice—was looking to retire, and needed someone with Michael’s background to take over her business. They worked side by side to ensure a smooth transition, and in 2015 Michael officially took over the business, excited to get to work one on one with clients, rather than the institutional fund work he had been doing. “I knew people were in need of an advisor who...knows the ins and outs of how to get things done the right way.”

He’s thrilled to have built a private practice that allows him more time to volunteer and be active in the community and with his family. Michael and his wife Melissa, a physical therapist at Kaiser Permanente, raised two daughters, Katelyn and Angelina, both young adults now, and embarking on careers of their own.

When he and Melissa first moved to Sonoma County, he was struck by the calmer pace of life, and by how generous and welcoming people were. “I love that the people I work with are so humble; Sonoma County is really a down to earth kind of place with people helping each other.” For many of Michael’s clients, giving back is a fundamental part of their lives, and Michael is often called to help them meet their philanthropic goals, which frequently includes Community Foundation Sonoma County.

In 2014, Michael became more intimately acquainted with what CFSC has to offer donors with an interest in philanthropy by serving on our Investment Advisory Committee, a group of individuals with a background in financial services who help establish investment policies for the Foundation.

This experience in working with the Foundation helped deepen Michael’s level of trust and confidence in referring clients to us for philanthropic planning. “There is a big commitment on the donor’s part to go with you, but it is so rewarding when they do,” explained Michael. “It is not as much about the cost, but about the service you offer. I feel so much more confident that when my clients are looking to be supported in their giving, their experience with you will be positive and impactful.”
About 20 years before he passed away, Paul Purdom sat his sons—Charlie and Ned—down to discuss his estate plan and the legacy he wanted to leave. A successful public relations and real estate business owner who was dedicated to philanthropy, Paul wanted to be sure that his estate would support the causes and places he cared about, and he looked to Charlie and Ned to carry on his legacy.

Paul envisioned creating a private family foundation, but after he passed in 2013, Ned and Charlie consulted with legal counsel and realized that a private foundation would require a burdensome level of administrative and legal overhead. According to Ned, “Literally a week before we filed our 501(c)(3) paperwork, our attorney David Bjornstrom said, ‘I just met with the Community Foundation; this might be a great alternative for you.’”

Ned recalls the initial meeting he and Charlie had with our Vice President for Philanthropy, J Mullineaux. “It was apparent after just 45 seconds that by establishing a donor advised fund we could shed all the burdens of paperwork...”
and legal fees and instead focus on our giving.” They opened their fund, and for the past three years, have been happy to dive deeply into making their father’s legacy the full focus of their philanthropy. 

Ned, 62, and Charlie, 54, were raised in the town of San Anselmo in Marin County. Charlie remembers the spirit of generosity that their parents modeled. “It was really always around us growing up and we didn’t realize it was philanthropy or that my dad was a philanthropist. He was always giving.” Their mother Betsy, was an active volunteer, spending many years supporting Sunny Hills Services (now Side by Side.)

After their father retired from business, Paul moved to Sonoma, and fell in love with the Valley. He lived in Sonoma for 25 years, and enjoyed gardening, hiking, watching films (and walking out of those he didn’t love). He asked his sons to ensure that the majority of his philanthropic estate would go towards supporting causes in the local community.

Today, Ned still lives in San Anselmo, and Charlie, based in Sonoma, acts as the pair’s eyes and ears in the Valley, keeping tabs on nonprofit organizations and identifying giving opportunities as they arise. Guided by their father’s wishes, they’ve focused their giving in the Sonoma Valley, supporting organizations working in the arts, education, environment, healthcare and human services fields—causes that were close to their father’s heart. Ned explains, “He was deeply concerned about education; I think he saw education and healthcare as two big areas where economic inequality is super apparent. Seeing kids get to college was really important to him.”

Paul graduated from University of California, Berkeley in 1950. Cal was a source of lifelong joy, pride and frustration for him. (He could never understand why the Bears were unable to repeat the three consecutive Rose Bowl appearances he enjoyed as an undergraduate!) Paul remained a lifelong learner, taking extension courses in astronomy at Cal in his 70s. “He saved his report cards,” recalls Charlie.

When Charlie and Ned talked with J about honoring Cal and how they could help make attending the university more attainable for Sonoma County students, we helped them to establish a scholarship fund at the school. Ned says that they’ve seen the requests for aid changing over these past two years. “We could watch the need go up after the fires because more Cal-bound students were in need after the fires.”

Graduates of Cal themselves, and with professional backgrounds in software and technology (Charlie) and marketing and teaching (Ned), it’s no surprise that the brothers have been happy to utilize technological solutions to track their giving. They share spreadsheets of grants they’ve made, and even keep track of which fields they have funded the most. Ned explains that their true test of whether to give to an organization is asking themselves, “Would Paul be cool with it?”

“[Philanthropy] was really always around us growing up and we didn’t realize it was philanthropy or that my dad was a philanthropist. He was always giving.”
SONOMA COUNTY RESILIENCE FUND

$15 MILLION+
DONATED TO OUR RESILIENCE FUND
to support long-term fire recovery over
the next several years.

7,500+
DONORS FROM AROUND THE WORLD
Over 70% of our donations came from
outside of Sonoma County.

*Information on the Resilience Fund is current to July 2019
$3,857,000 (and counting)

GRANTS FOR HELPING, HEALING, HOUSING

Since the fires, the Resilience Fund has made over $3.8 million in recovery grants to more than 40 organizations helping individuals recover financially and emotionally, and to support collaborative housing solutions in our community.

A sample of grantees include: Legal Aid of Sonoma County, United Policyholders, Community Action Partnership of Sonoma County, Catholic Charities, the Sonoma Community Resilience Collaborative, and SHARE Sonoma County.
Nonprofit organizations often help people develop their own capacity to do more for themselves. We see this when a youth visits Teen Services Sonoma to build job skills, or a child comes to Art Escape to engage creatively with artists who are passionate about teaching, or when a homeless person regains their stability through housing at Sonoma Overnight Support.

But how do nonprofit organizations find the time to develop their own capacity for improvement? This question is at the heart of our Sonoma Valley Fund’s capacity building grants program, which launched in 2015.

Over this three-year grant program, the leaders of Art Escape, La Luz, Sonoma Valley Mentoring Alliance, Sonoma Overnight Support, Teen Services Sonoma, and Boys & Girls Clubs of Sonoma Valley met quarterly—under the guidance of a consulting team from Informing Change—to learn from each other and develop their programs, staffing, and data collection practices. Cohort participants described the program as “transformative.”
Art Escape, located in Boyes Hot Springs, offers free art projects for parents and children, weekly after-school art classes for elementary school students, and more. The leaders of Art Escape wanted to focus on growing their programs and hiring program and administrative staff. Over the course of the grant program they hired their first staff members, increased their board from five to nine members, and more than doubled their annual budget.

Kate Ortolano and Thena Trygstad, two of the volunteer cofounders of Art Escape, explain that when they first applied for a capacity building grant, the art program was entirely volunteer run, and their participation in the capacity building cohort enabled them to reflect on the need for creating paid staff positions and growing their board as they continue to expand. Thena explains, “In terms of the cohort, we are the smallest of the six organizations that were chosen. We felt extremely lucky we’ve had the opportunity to learn so many things from exposure to the other organizations.”

Helping teens build their own capacity is the focus at Teen Services Sonoma, where youth engage in work experience programs to prepare them for future careers in a variety of fields. Their former Executive Director Cristin Felso, who participated in the capacity building initiative, said that one of the first steps her organization took as a member of the cohort was to work together with other youth-serving agencies, including the Mentoring Alliance and the Boys & Girls Clubs.

“We interacted with these other organizations for years, but now we had a roadmap for how to truly partner in a meaningful way.” Through the capacity building cohort, these three organizations came together to develop a better system for collecting data within their own agencies, as well as sharing information across agencies. “We serve youth in different ways, but once we could see the points where our programs cross over, we can better serve our youth and create stronger outcomes for them.”

For Cary Dacy-Snowden, CEO of Boys & Girls Clubs of Sonoma Valley, the value of this capacity building grant was clear. “As the new CEO, I was very fortunate to join the cohort when I did. I developed quick partnerships with Cristin Felso (Teen Services) and Lee Morgan Brown (Sonoma Valley Mentoring Alliance) and learned in depth what services they were providing, how we could create a unified front for the teens in our community and how we could better serve that particular population as a whole.”

The best part of the capacity building cohort? It's the long-term effects of having helped this community of nonprofit leaders learn together. Kate Ortolano explains, “We now have relationships that wouldn’t have been fostered if we didn’t have this opportunity. Now we’re looking at how to continue these relationships in the future and talking about how to support each other instead of being competitors.”
Early Childhood Development

As grantmakers, we aspire to do more together because we know that when we can leverage funding and make collective grants, we can create impact on a larger scale than would be possible by making grants alone. This principle is at the heart of a new grants program we launched last year in partnership with First 5 Sonoma County and the Healthcare Foundation of Northern Sonoma County.

Focused on making a positive impact in early childhood development, the idea for this new grants program was sparked by a conversation at the Sonoma County Funder’s Circle, a group of local grantmaking organizations who meet regularly to share knowledge, keep up to date about local issues, and find ways to work collaboratively to tackle our community’s largest needs.

Angie Dillon-Shore, executive director of First 5 Sonoma County, explains, “So often nonprofits’ funding streams change from year to year. Long-range planning is next to impossible when you’re worried about your next grant cycle. At the Funder’s Circle, we were asking ‘what can we do to
ensure that the organizations themselves are more resilient, sustainable, and able to pivot when a funding source shifts?"

Resilient Organizations: Sustainable, Impactful, Effective, or ROSIE for short, was born from this question. “We designed the ROSIE capacity building program to help support organizations to build long-term stability so they can weather the storm of fluctuating funding,” said Angie.

The organizations—Community Action Partnership of Sonoma County, La Luz Center, Petaluma People Services Center, Extended Child Care Coalition, North Bay Children’s Center, Child Parent Institute and Community Child Care Council (4Cs)—represent diversity across geographic lines, client demographics, staffing sizes and financial and service models. They share a common cause: helping children, prenatal to five, to grow up in an environment that offers them every opportunity to thrive.

The leaders, both executive directors and board chairs, will participate in a two-year training program designed to fortify their leadership skills, deepen connections, strengthen their organizational infrastructure, and nurture strategic thinking. They’ll do this by working with a professional coach from Fiscal Management Associates (FMA) who will guide them through an assessment of their organization’s current infrastructure and conduct a financial trends analysis for each organization, creating an action plan to set the stage for long-term sustainability.
Legacy Donors

We gratefully acknowledge our donors who have chosen Community Foundation Sonoma County to steward their future planned gifts.
The donors who choose to make a legacy giving commitment believe in our shared responsibility to leave this place better than we found it. Their gifts create an enduring legacy: offering hope to people and communities who need it most, and supporting organizations working to solve our most pressing concerns.

We are grateful to these donors for entrusting Community Foundation Sonoma County to carry out their vision and bring inspiration and practical solutions for the future.
COMMUNITY FOUNDATION SONOMA COUNTY

Financial Summary

TOTAL ASSETS 2018: $178,634,500

TOTAL CONTRIBUTIONS 2018: $18,396,200

TOTAL GRANTS AWARDED 2018: 1,041

GRANTS AWARDED 2018:

TOTAL GRANTS AWARDED, 1983-2018: $224,879,800

HEALTH & HUMAN SERVICES  
$5,254,200  
423 GRANTS

ENVIRONMENT  
$2,098,000  
106 GRANTS

EDUCATION & SCHOLARSHIPS  
$2,179,200  
222 GRANTS

RESILIENCE FUND  
$2,153,700  
19 GRANTS

ARTS & CULTURE  
$612,600  
131 GRANTS

ANIMAL WELFARE  
$108,500  
18 GRANTS

OTHER  
$1,121,800  
122 GRANTS
HEALDSBURG FOREVER

Our regional affiliate in the north county, Healdsburg Forever, celebrated a record $175,000 in grants to 22 nonprofit organizations in 2018. Since launching in 2003, Healdsburg Forever has granted over $1.1 million to more than 50 nonprofit organizations in the Healdsburg and Geyserville areas.

These grants are made possible through the generosity of donors who have supported Healdsburg Forever in growing their endowment to $1.6 million.

SONOMA VALLEY FUND

Our Sonoma regional affiliate, the Sonoma Valley Fund, celebrated the successful conclusion of a three-year capacity building grants program in 2018.

The grantees: Art Escape, La Luz, Sonoma Valley Mentoring Alliance, Sonoma Overnight Support, Teen Services Sonoma, and Boys & Girls Clubs of Sonoma Valley, describe the experience as “transformational.” Over the course of the program these nonprofits increased their fundraising, financial, and technical abilities—all with the outcome of being able to better serve their clients.

Supporting Organizations

OLIVER RANCH FOUNDATION | oliverranchfoundation.org
Promotes artistic appreciation for site-specific sculpture and performances and protects the natural beauty of the land.

CHOP’S TEEN CLUB | chopsteenclub.org
Chop’s Teen Club provides a safe, fun, and productive place where teens engage, connect and discover their true potential. At Chop’s teens receive ongoing mentorship, gain leadership and work readiness skills, improve study habits, and take part in quality art, music, culinary, technology and sports programs.