



2020  
ANNUAL REPORT







## A MESSAGE FROM OUR **President & Chairs**

Elizabeth Brown, President and CEO

Thelia Wade, Board Chair *and* Richard Davis-Lowell, Vice Chair

During a year characterized in so many ways by tragedy, change, and heartbreak, Community Foundation Sonoma County has responded to what feels like never-ending cycles of disaster brought on by seasons of wildfires and a pandemic. At the same time, we've witnessed daily examples of hearts opening to reveal more compassion and generosity than ever before.

This compassion quickly turned into action, characterized by three through-lines: a commitment to

equity; increased giving; and building innovative partnerships.

**Equity:** The COVID pandemic has repeated the pattern we found to be true from other disasters: when it comes to access to resources, there is a great divide along the lines of both wealth and race, be it having secure employment or access to healthcare and vaccines.

As the early months of the pandemic unfolded, we quickly developed a focused grant strategy, investing nearly \$4 million from our Sonoma

County Resilience Fund into nonprofit organizations supporting communities disproportionately impacted by the pandemic.

As an organization, we are committed to taking on these issues at a fundamental level. This includes a deeper exploration of our foundation's Diversity, Equity, and Inclusion (DEI) principles, recognizing that we must look in the mirror as an organization and examine our own policies and practices. We will continue this journey at CFSC and support our nonprofit community in pursuing their own DEI work.

**Giving:** Philanthropists in Sonoma County, both those we've known for years as well as new donors, doubled down on their giving during the pandemic.

We saw incredible generosity from the broader community—raising nearly \$5.7 million directly for our Resilience Fund focused on disaster response and recovery.

Courtesy of this generosity, CFSC made significant investments in nonprofits providing services to those needing food, shelter, and other basic human needs. We also continued our strategic investments in finding solutions to help heal community trauma as mental health issues brought on by disaster became even more apparent, especially among young people.

**Partnership:** In Sonoma County, we have a track record of coming together to innovate in times of disaster. This year we witnessed our nonprofit

partners creatively and quickly changing the way they deliver services. As essential workers, staff at these organizations provided front-line service during a time of considerable risk. They are among our local heroes.

At CFSC, we also found new ways of partnering and leveraging relief funds by working with local leaders in Sonoma Valley and Healdsburg Forever to launch fundraising campaigns. These campaigns raised hundreds of thousands of dollars for financial assistance programs, vaccine and food distribution, all fighting the devastating impacts of Covid in their communities.

Like all organizations, our staff has had to be extremely nimble this year. We are very proud of how our team has handled the year's challenges, doing so with flexibility and kindness. A particular bright spot has been the launch of our internship program, which has added young leaders to our staff, bringing new energy to our work.

We hope the pages that follow will inspire you and that these stories open your heart as they have ours. They are reminders of the strength and vitality of this wonderful Sonoma County community we all call home.



Elizabeth Brown  
President and CEO



Thelia Wade  
Board Chair



Richard Davis-Lowell  
Vice Chair



## OUR EQUITY STATEMENT

**We know** that in order to create a fair and just community, some may need more to achieve the same.

**We embrace** our differences and our common bond.

**We cultivate** leaders, supporting them to advocate for their communities and empowering them to create change.

**We promise** to tackle tough issues with compassion and courage, choosing humbly to take a step forward instead of resting in the comfort of where we are.

## OUR BOARD

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## MEET OUR **2020-2021** INTERNS

We were thrilled to welcome three new interns to our team in 2020. In our internship program—which is new to the foundation—we offer promising young leaders paid learning opportunities and access to the field of philanthropy, which too often can be exclusive and hard to break into.

To launch our internship program, we partnered with 10,000 Degrees—a college success organization supporting students from low-income backgrounds to succeed in college and beyond—with scholarship and career supports. Eighty-five percent of 10,000 Degrees students are first-generation college students.

Working with 10,000 Degrees, we connected with dedicated and inspiring students who were seeking work

opportunities. We were delighted to welcome Diana, Rosa, and Maria to their new roles. In just a year the impact they have made is remarkable—setting the tone for our internship program for years to come.

### **Diana Ortiz**

#### *Communications Intern*

I was born and raised in Marin County, and I'm the youngest of 3 and now a proud Aunt to my baby nephews. I'm a first-generation college student and am grateful for the opportunity to have an education, which my parents didn't have access to. When I'm not working, or in school, I really like to paint, go on walks, and try new foods.

### **What are you learning in your role at CFSC?**

The biggest thing I'm learning is how our work impacts the community and how we partner with so many nonprofit organizations.

I've gotten to launch our Instagram this year, and I'm in charge of running our social media, sharing news about our grants, the nonprofits we support, and other important community information.

### **Maria Sosa Ramos**

*Philanthropic Planning Intern*

I come from a low-income community background, and my first public education experience failed me. My parents, neither of whom held a college degree, knew the value of education. Before heading out to work in the early mornings, my dad would lean down by my bed, give me a kiss on the cheek and say, "Echale ganas a la escuela mija," which translates to "give it your all in school, my little girl."

These words were a constant reminder that no matter how hard the journey may be, I held the strength and capabilities to succeed because my parents believed in me.

I've faced financial barriers and obstacles in my educational journey, but I learned to get back up stronger after each setback and to find help where I needed it. Today I am pursuing a college degree and will even be graduating early.

### **How would you describe your role at CFSC?**

I get to research nonprofit organizations and talk to them about their needs and plans. I'm also attending webinars and reporting back to our team to help us learn how to improve our community impact and donor experience. For nonprofit organizations that haven't

yet worked with us, I contact them to exchange information about potential funding opportunities and community impact.

My role is to ensure that both our internal team at CFSC and nonprofits have the information necessary to guide future philanthropic decision-making.

### **Rosa Colin Vasquez**

*Community Impact Intern*

My parents got divorced when I was 8, and my mom raised my siblings and me in Petaluma on her own. She really taught me about hard work, and I've always tried to help out where I could—like watching my younger siblings while my mom worked. I'm still really close with my family, and with shelter in place, one thing I've loved to do is go on walks with them.

I'm a first-generation college student, and I just graduated from Santa Rosa Junior College with three associates degrees—sociology, natural science, and social and behavioral science. My goal is to continue pursuing a degree in social work.

### **How would you describe your role at CFSC?**

I feel really connected to helping in the community, and I think I bring a new perspective to the foundation, with a different lens to look at things. I try to provide fresh input and feedback and help us connect with organizations we haven't worked with before.

In addition to my internship here, I am also working at Adopt-A-Family of Marin, where I work with families that are struggling. I think it's given me a helpful perspective because I get to see both sides of grantmaking—the giving and receiving.



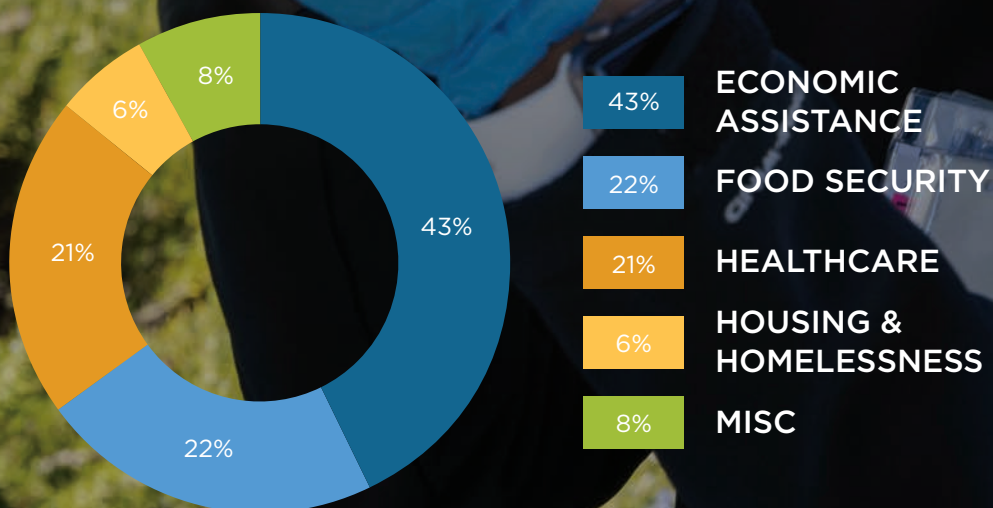
# From wildfires to pandemic and back again

With the Walbridge and Glass fires, the 2020 fire season brought further destruction and renewed trauma in a community already suffering from the impacts of Covid and the long-term impacts of fires in 2017 and 2019.

## *Our Coronavirus Response*

**\$8.4 million in grants to date\***

Our donors stepped up to give an unprecedented amount in response to the Covid crisis. Grants from donor advised funds and from our Resilience Fund are making a tremendous impact, helping provide vaccines, food, and economic assistance to thousands of Sonoma County families.

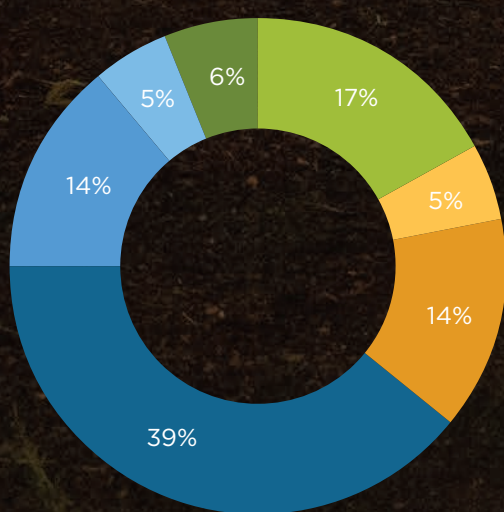




# THE SONOMA COUNTY *Resilience Fund*

## Over \$14 million in grants since 2017\*

Through the Resilience Fund, we are helping people impacted by local disasters through grants supporting nonprofits offering economic assistance, trauma and healing programs, creating housing solutions, and disaster preparedness efforts.



17%	\$2,389,000 COVID RECOVERY
5%	\$730,000 WILDFIRE EMERGENCY GRANTS
14%	\$1,904,000 HEALING & TRAUMA
39%	\$5,553,000 HELPING INDIVIDUALS
14%	\$1,978,000 HOUSING SOLUTIONS
5%	\$656,000 PLANNING, RESEARCH, & CONVENING
6%	\$873,000 PREPAREDNESS

\*Grant totals through July 31, 2021





## LANDPATHS: FOSTERING A LOVE OF THE LAND, ONE CAMPER AT A TIME

The seeds for LandPaths were first planted in 1996, and the organization's mission was simple: foster a love of the land in Sonoma County. Since those early days some twenty-five years ago, LandPaths has acquired and preserved roughly 2,000 acres of parks and open space for generations of locals to enjoy.

In addition to stewarding our local oak woodland and coastal redwood ecosystems, they engage visitors of all ages through education and hands-on participation in outdoor exploration.

"I think of LandPaths as a community institution, a movement of people and land," says LandPaths executive director Craig Anderson, who has been with the organization since 1997.

**"It's a way [to build] a healthy community by fostering relationships with place."**

Among the numerous visitors developing a love for the land are local youth. First launched in 1999, the organization's youth programs have grown into multiple well-attended and successful camps.

One of the longest-running and most popular camps at LandPaths is Owl Camp, a nature immersion summer camp hosted at their open space properties and other partner locations.

Owl Camp now hosts hundreds of kids between the ages of 6-13 each summer. One camp takes place at their Rancho Mark West site, which the 2020 Glass Fire impacted, and another at the privately-owned Preston Farm in Healdsburg.



In addition to Owl Camp, LandPaths operates several other camps for younger kids, hosted over spring break and summer. LandPaths also host treks for older teens, including a river kayaking trek and a backpacking trip. In 2021, they launched their first Queer Youth and Allies program—a dedicated program where LGBTQ kids and allies can build community while learning about nature.

One of the things that ensures the success of LandPaths' camps is the organization's commitment to ensuring that at least 50% of attendees receive scholarship support. In 2021 alone, Anderson says that they've made at least 500 scholarships available.

"When you have [only a few] kids that are on scholarship or coming on the bus from somewhere else, and they arrive, and they're only a small part of the population, where do they stay?" says Craig. "They stay with the person that looks like them, who speaks their language."

**To combat this, LandPaths increased their scholarships to create more diverse and inclusive environments at their camps.**

With kids in socio-demographically and culturally diverse groups, the campers better represent the population of Sonoma County, adds Craig.

It's essential that every child feel welcome, Craig explains. "I could get pretty teary-eyed at this moment right now, talking to you, thinking about what that does for kids to have experiences with kids their age, kids just like them. It's profound."

Grant funding has been key to sustaining the LandPaths camp programs.

"If we just charged people that wanted to come, we could pay for camps. We might even make money on camps, but that's not our purpose," explains Craig.

One source of scholarship funds comes from a Community Foundation donor, who set up a fund to help support the LandPaths camps in memory of her daughter, who loved being out in nature.

The pandemic has not hindered enrollment, and Anderson says they've had strict protocols for kids to stay healthy and safe while enjoying camp activities. The camps have provided much-needed respite during a nationally and globally tumultuous time while ensuring deep connections to Sonoma County's ecosystems and community for generations to come.

**"One of the most important things we can do is simply provide opportunities for young people to see how they can belong to a community, how the land is there for them,** and how it's part of their cultural background and their birthright," says Craig. "Learning to love the land requires they share some love right back, because [our environment] needs to be restored."

For many youth, the camp experience is one of their first in nature. Youth were busy feeding the chickens at Preston Farm when foundation staff stopped by the spring break camp earlier in the year. It was their first time meeting a chicken for most of the attendees, and they loved the novelty of seeing where eggs come from.

"The testimonials we hear from parents like: 'This made my child's summer,' keep us going and keep us fixated on simply trying to do the just thing—providing opportunities for all kids to know the outdoors and get to know themselves all the more."

To learn more about LandPaths, visit [landpaths.org](https://landpaths.org).





## DONOR SPOTLIGHT: **WHITNEY EVANS**

Sonoma volunteer and generous community donor Whitney Evans grew up in Cleveland, Ohio, the birthplace of the very first community foundation, which helps explain his love for the community foundation model.

“I spent the first 50 years of my life in Cleveland, and I knew people who served on the board of the Cleveland Foundation, and they were making an enormous difference in a very challenged community.”

As a dedicated volunteer, Whitney has humbly served in the Sonoma Valley since moving to Sonoma with his wife Jeanette 30 years ago, serving in roles including founding president of the Sonoma Valley Fund, past board member of the Boys & Girls Clubs of Sonoma Valley, the Sonoma Valley Education Foundation, and many more.

As someone who focuses on making a difference over the long term, Whitney is never satisfied unless he’s making an impact—one reason why having a donor advised fund at Community Foundation Sonoma County is so important to him.

“My particular belief is that **to have established a donor advised fund at the Community Foundation was, without a doubt, the most important thing our family has done** to increase the financial support we could give to charities.”

“Successful investing in the last decade has made it easy to say to my financial advisor, ‘okay, it’s time to replenish my donor advised fund.’ Each time I make a gift of appreciated securities, it’s delightful to think, ‘that stock has appreciated, so the charity is getting far more than the original cost, and I can give that much more to the community.’”



As a donor, Whitney tends to support organizations he knows intimately and primarily makes grants for general operating support.

“It’s really rewarding—I always love to follow along and see what’s going on in those organizations and give some helpful hints where I can.”

Married for just over 62 years, Whitney and his wife Jeanette fell in love with the Sonoma Valley as soon as they arrived.

**“June was our 30th year in Sonoma Valley, and I tell people, I wished it had been 60 years.”**

When asked what makes Sonoma Valley so unique, he explains, “The thing about this community was the instant acceptance. If you raised your hand and you wanted to help, you were accepted.”

“I’ll always remember the first project that I was aware of was building the Field of Dreams.”

Whitney remembers visiting the project when it was being built. “When I did, I asked ‘Who’s that older guy with the shovel over there?’ and was told ‘Well, that’s Bob Stone.’ Bob was the creator of the Field of Dreams and a major funder of the project, and he’s out there with a shovel helping build it. That’s Sonoma Valley. That’s what it’s all about here.”

Whitney’s passion for volunteering took on a new focus in 2016 after Jeanette was diagnosed with Alzheimer’s and began suffering from early dementia. They were fortunate to receive excellent counseling from Dr. Patricia Brooks, learning to live with memory loss knowing there was no cure.

“When I said to Dr. Brooks, ‘How do people get this information that you’ve given me because it’s been so helpful?’ She told me there’s nothing organized to do that—if a physician doesn’t refer a patient to her, it doesn’t happen.”

**“I said, Okay, we got to do something about this.”**

Whitney formed the nonprofit Care Partners Initiative to help Sonoma Valley families cope with symptoms of dementia. They hosted their first forum, a four-hour educational forum to help caregivers understand the illness, and they had 84 grateful attendees.

Care Partners’ mission is to increase awareness and support for Sonoma Valley families living with memory loss and to enable caregivers to better care for themselves and their loved one. One of Whitney’s favorite activities for those with memory loss is pet therapy, citing the supportive influence of their own dog in keeping their spirits up at home.

“If the care partner learns how to live with memory loss, then the person can stay at home rather than being in a nursing home or care facility. The facilities do the very best they can, but it is very different. My wife tells me three times a day that she loves me. That wouldn’t happen if she weren’t at home. We have a wonderful, different quality of life, but a wonderful quality of life.”

Over the coming months, Whitney will be staying busy—focusing on helping Care Partners Initiative introduce strategies to other Sonoma County communities to meet the needs of seniors and their families living with memory loss and other needs identified in the new California Master Plan for Aging.

When asked how he manages to stay so driven, Whitney explains, **“When you’re retired, it’s your time to give back in thanks for all you have been given.”**

“Having a passion for getting involved kept my father alive until he was 90 years old, and I’m planning on 100 years myself. So that’s how I keep the light on, too.”



# COMMUNITY FOUNDATION SONOMA COUNTY

## 2020 Financial Summary

TOTAL  
ASSETS

**\$206M**

TOTAL  
CONTRIBUTIONS

**\$16.5M**

TOTAL  
GRANTS

**\$20.2M**

to 567 nonprofits

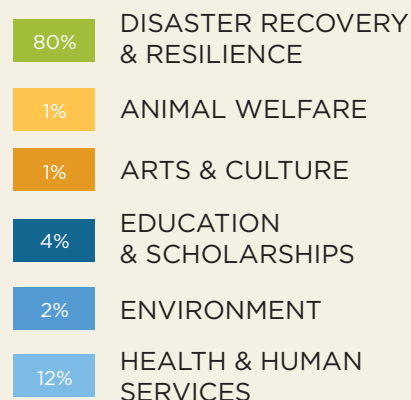
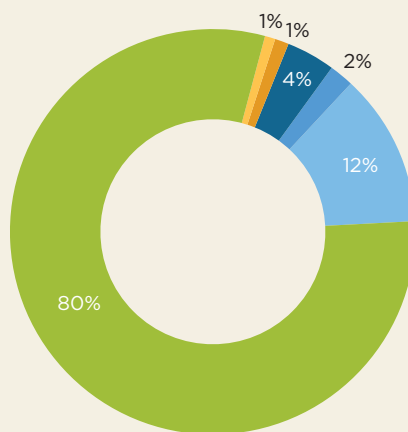


### Program Grants

**\$7.4M**

Our Community Impact Team stewards donations given to impact funds—like our Resilience Fund—along with legacy bequests from donors who left gifts to the foundation in their estate plans.

These grants support nonprofit organizations working to make Sonoma County a place where everyone can thrive.

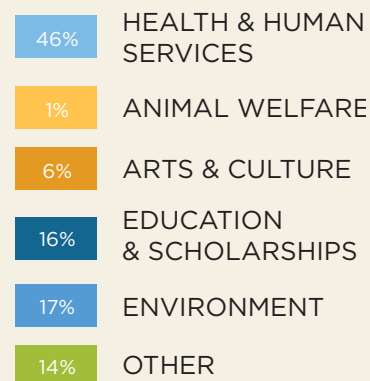
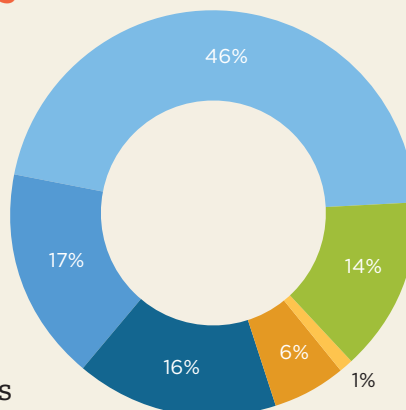


### Donor Advised and Other Grants

**\$12.8M**

On behalf of our passionate and generous donors CFSC made a record \$12.8 million in grants in 2020. 91% of these grants went to organizations working here in the Bay Area.

Our donor advised fund payout rate for 2020 was 23%. Payout rates comprise the amount distributed across all donor advised funds collectively.





# 2020 Investment Performance

The assets entrusted to us are invested with a goal of offering donors a range of pool options, all of which return strong performance, ensuring that donors are able to grow their investments and grants. This table illustrates our pools' performance, net of fees, as of Dec 31, 2020.

	Pool Assets	YTD	1 Year	3 Years*	5 Years*	Since Inception*	Date of Inception
<b>LONG-TERM POOL</b>							
<b>Long-Term Pool</b>	\$122.8M	17.49%	17.49%	10.01%	10.61%	6.94%	2/1/1997
<b>Composite Benchmark</b>		12.95%	12.95%	8.88%	9.89%	6.49%	
<b>SOCIALLY RESPONSIBLE INVESTMENT POOL</b>							
<b>Socially Responsible Investment Pool</b>	\$30.3M	12.98%	12.98%	8.92%	9.31%	5.68%	6/1/2001
<b>Composite Benchmark</b>		13.3%	13.3%	8.89%	9.61%	6.5%	
<b>INTERMEDIATE-TERM POOL</b>							
<b>Intermediate-Term Pool</b>	\$24.8M	11.3%	11.3%	7.02%	6.34%	4.14%	8/1/2003
<b>Composite Benchmark</b>		8.63%	8.63%	6.41%	6.12%	4.96%	

\*Performance results are annualized for time periods greater than one year.







# Legacy Donors

We gratefully acknowledge our donors who have chosen Community Foundation Sonoma County to steward their future planned gifts.

Joseph and Beth Aaron  
Eileen Adams  
Tania Amochaev  
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Leon Beck  
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Ruth and Martin Wilson  
Connie and Philip Woodward  
Lynn Woznicki and Ray Holley  
Judith Ann Young  
Gloria and Jeffrey A. Young  
Anonymous (22)

**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.**



## OUR MISSION

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

## OUR TEAM

In 2020 and 2021 we welcomed new faces, celebrated birthdays, holidays, and professional milestones all over Zoom.

While working remotely, our shared mission of supporting our community kept us together, with 2020 marking a new record for grants made.

Generosity we could never have facilitated without our donor's incredible commitment to making an impact through philanthropy.

*Thank you for partnering with us to make a difference this year and every year.*



Brenda Beal



Rosa Colin Vasquez



Elly Grogan



Rachel Harstad



Olivia Howell-Wilson



Diana Ortiz



Minal Patel



Maria Sosa Ramos







Elizabeth Brown



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