

2021 ANNUAL REPORT



COMMUNITY
FOUNDATION
SONOMA
COUNTY





A message from our **Interim CEO & Chairs**

Since joining the Community Foundation Sonoma County as interim CEO in February of 2022, I've been grateful to have had the opportunity to work with the dedicated and talented staff, meet our donors, and work with our board as we seek our next permanent CEO.

I've also had the opportunity to see the best of our community leadership, from helping launch the new Portrait of Sonoma, to the ways our donors stepped up to address the crisis in Ukraine.

Time and time again, we've seen our community of donors come together to support our beloved county. From the more than 450 fundholders we work with, to the

3,500+ donors who collectively gave more than \$25 million to our Sonoma County Resilience Fund after the pandemic and devastating wildfires, your generosity is unmatched. We are incredibly grateful and proud to serve this community.

We continue to fulfill our promise to bring people, ideas, and resources together to benefit all who live here. We've worked as leaders in the community to bring donors and other funders, as well as government, nonprofit, and community partners together to tackle our region's most pressing challenges.

In the pages that follow, you'll see stories that exemplify the best of this leadership,



from the ways we've encouraged listening, to better understand the issues facing our community, to how we've supported donors in growing their philanthropy.

I'm incredibly proud to share that **last year, CFSC and our donors provided more than \$15 million in grants supporting more than 500 nonprofit organizations.** Our staff held leadership roles in vital community initiatives, such as Health Action and the Portrait of Sonoma, and our Community Impact grant programs provided desperately needed funding to organizations working across the community in animal welfare, arts, education, environment, and human services fields.

Our board is leading a transparent, equity-centered process to guide our search for

our organization's next leader, and **we're excited for the year to come**—one where we'll be celebrating the 40th anniversary of CFSC and the differences we've made over those years. With more than \$275 million in grants made since 1983, we have much to be thankful for.

Thank you for your involvement, support, and commitment to making Sonoma County a better place to live.

Sheryl Alexander
Sheryl Alexander
Interim CEO

Thelia Wade
Thelia Wade
Board Chair

Richard Davis-Lowell
Richard Davis-Lowell
Vice Chair



Donor spotlight **SAM & BETZ MILLER**

Sam and Betz Miller met when Sam worked in sales for West Publishing, and Betz worked as a cataloging librarian for a Bay Area library. Married for the past 31 years, Betz and Sam have loved making their home in Santa Rosa and, after retiring early, have spent the past few decades giving back to the community they love.

Betz explains that their drive to give springs from the values they gained through their faith: “While we grew up in different faiths, our approach to giving is complementary. We take care of the people around us first.”

Together, they prioritize giving to local causes close to their hearts, including support for organizations such as **Social Advocates for Youth (SAY)**, the **Redwood Empire Food Bank (REFB)**, and the **YWCA**.

Sam adds that while he always had enough food on the table growing up, his parents—Jewish immigrants from Ukraine and Russia—struggled to afford more than the bare necessities. “I remember getting help from charitable organizations when I was growing up,” he says.

Now, Sam shares their gratitude at being able to give back: “Our families are taken care of, and we didn’t have any children, but we see people suffering from homelessness, with housing—people are struggling to afford the cost of living here.”

To support their giving, opening a donor advised fund—and leaving a legacy gift to the Community Foundation—made sense to the Millers. Sam recalls first hearing about CFSC when he learned that a community

Photos: Sam and Betz at their Santa Rosa home; a youth working through SAY’s career and life readiness programs; a client picking out fresh food during a distribution at the Redwood Empire Food Bank.

member he admired had left a gift to the Foundation in his estate. Sam explains, “Hearing about that felt inspiring.” They began thinking about their estate plans, and Sam knew they would want to do something similar.

“It feels good to know that people here will continue to receive help from us, long after we can make gifts directly,” Sam shares.

TAILORED PHILANTHROPIC SUPPORT

Because they created their planned giving agreement long ago, it’s become time for them to re-visit their estate plan—a practice CFSC encourages donors to do from time to time.

In partnership with Kristin Nelson, their philanthropic advisor, they’ll have a chance to reflect on their values and the community’s needs to identify whether there are any specific organizations or issue areas they want to support.

CFSC also offers donors the opportunity to maximize their impact by giving alongside other donors to one of our Community Impact funds that target specific areas of need—such as our Foster Youth grants program.

In addition to their legacy giving plans, Sam and Betz have a donor advised fund with Community Foundation Sonoma County. They’ve come to rely on the personalized advice they receive from CFSC.

“In February, when things in Ukraine got worse, we immediately reached out to Kristin for support on where to give,” Betz shares.

Kristin wrote back quickly, offering a short list of organizations doing work in the region, tailored to their interests and giving history.

“It’s so helpful to know that I can trust Kristin to offer that support—and trust that I can rely on the advice she gives,” Betz shares.





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
Ellen I. Amsterdam-Walker and
Donald B. Walker
Jerry Anderson and
Tricia Coxhead
Shunya and Keith Anding
Paul and Judith Archambeau
Nichole and Todd Au
Lori and Chris Baker
Phyllis and Chris Baldenhofer
Russell Bair
Barbara Banke
Christina Barasch and
Stephen Yingst
Diana and Steve Barclay
Sharon Bard
Margaret Beeler and
Thomas R. von Tersch
Stephen A. Bessone
Judith C. Bjorndal and
Ron Wallachy
Kimberly and Simon Blattner
Cynthia Boaz and Jason Liles
Brennie and Larry Brackett
Ellen and Drew Bradley
Libby and John Brady
Suzanne Brangham
Linda Brekken and Tom Bakke
Mary and F. James Brock
Lawrence Broderick
Barbara D. Brown

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Dwight Cary
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David B. Andersen
Janet D. and Harvey Charnofsky
Sandy and John Chute
Zanne Clark
Susan Cohen and
Diane Gravenites
Mollie and Dennis Collins
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Ben Cushman and George Tuttle
Harriet Derwingson
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Roselee Dunlavy
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Richard Ernst
Angela and Nicholas Frey
Katherine Fulton and
Katharine Kunst
Gemma Gallovich and
Theodore J. Cutler
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Robert Gilchrist
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William Thompson
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Dr. Stephen V. Bohn
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Diana Mauregard
Linda Mayberry-Chavez and
Carlos Chavez
Scott McDougall and
Ray Goodenough
Mark McDowell
John McKinney
Christine and Steve Meachem
Lannie Medina and
Alan Smithwick
Betz and Sam Miller
Joyce E. Miller
Jeanne Montague and
Chad Overway
J Mullineaux and Matt Malik
Eileen and Ron Nelson
Nadenia Newkirk
Kathy and Bill Newlands
Janice and Jack Nicholson

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Nancy and Steve Oliver
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Doris Parker
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Vicki and David Stollmeyer
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Pam and John Story
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Michele and Scott G. Thayer
Ronald Treleven and
William MacElroy
Barbara Triol and
Katherine Wheelock
Robert Tuttle
Margaret E. Van Camp
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Rosa and Francisco Vazquez
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Von Der Porten
Thelia Wade
Cami Weaver
Lucy Weiger and Bob Crane
Barbara White and Fred Perry
Ruth and Martin Wilson
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Richard M. Kunde and
Saralee McClelland Kunde Trust
Estate of Leon Beck
Edwin Jack Blair Revocable Trust
and Lynn M. Blair
Estate of Norma Chandler
Estate of Hilda and
Ralph Mansfield
Estate of Gloria Menchini
Estate of Susan Miller
The Spirit Hill Trust
Anonymous (23)

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.



Donor spotlight

CAROL NEWMAN AND BARRY SOVEL

“Are you familiar with the Jewish religion? Do you know what ‘tikkun olam’ means?” Carol Newman asks.

“It means, ‘to repair the world.’ It’s a mitzvah, a good deed.”

Her husband, Barry Sovel, adds, “It’s very much a part of our cultural and religious background.”

Carol and Barry’s desire to help heal the world’s ills is at the heart of their commitment to giving. And their long-standing love of Sonoma County is what ties them to make that difference right here, in our small corner of the world.

Both are native Sonoma County residents and retired school teachers, and their support for education and learning is a life-long commitment. They recently funded

scholarships at **Roseland University Prep** and made a grant to the **Museum of Sonoma County** to support their Sonoma Stories exhibit, which features the oral histories of Gaye LeBaron.

Together since their first blind date in 2003, these two have been through significant life changes together, from navigating their retirement plans, to losing their Crystal Drive home in the 2017 fires and rebuilding their new home.

FINDING THE FOUNDATION

After they made what Barry calls “a fortunate investment with a startup,” their financial advisor, Chris Dobson, recommended they look into the Community Foundation. Chris’ suggestion immediately made sense to Carol, thanks to her involve-

Photos: Carol and Barry in their Petaluma home; a collage showcasing the Sonoma Stories exhibit from the Museum of Sonoma County.

ment as a founding member of the Impact 100 Redwood Circle, a program supported by CFSC.

Every year, in Impact 100 Redwood Circle, a group of more than 200 local philanthropic women gathers to combine their impact through a collective grants program that gives more than \$200,000 a year through a fund hosted at the Foundation.

In addition to the social benefits of meeting other community-minded women, Carol has learned about the work of many local nonprofit organizations, and she's had the opportunity to take part in their grant decision-making process as a member of the grants committee.

Carol and Barry realized it would be helpful to set aside funds dedicated for giving. "Later on, we learned that there were also tax advantages. We didn't realize that at first, to be quite honest."

Their donor advised fund has proved to be much more than just a financial benefit. "This gave us a venue," Barry adds. "We've started channeling all of our charitable giving through the Foundation."

While they each have projects they want to support, they take a collaborative approach to their giving. "We talk about it," Carol explains. "Usually, we both say, 'If it's important to you, go ahead.'"

STAYING ROOTED

Their collaborative approach to life was critical in the days and months after they lost their home in the 2017 fires. Even the trauma of losing the home Carol had owned for more than 30 years came with some silver linings. "That morning, I looked at Barry, and I whispered, 'I don't have to clean out the garage anymore,'" she says.

For Barry, the loss of their home brought a fresh perspective: "We both traveled before we met each other, and now with each other. We've seen a lot of different ways people live. We know how fragile it can be, and we know how fortunate we are. We survived a fire. We had our house and all its contents disappear."

"But not our home," Carol adds, "We said that all along: We lost our house, but not our home."

Today, they're happily living in the remodeled ranch house that was once owned by Barry's grandparents.

Despite the hardships of the past few years, their generosity and connection to doing good—to tikkun olam—is stronger than ever.



Leadership through grants and beyond



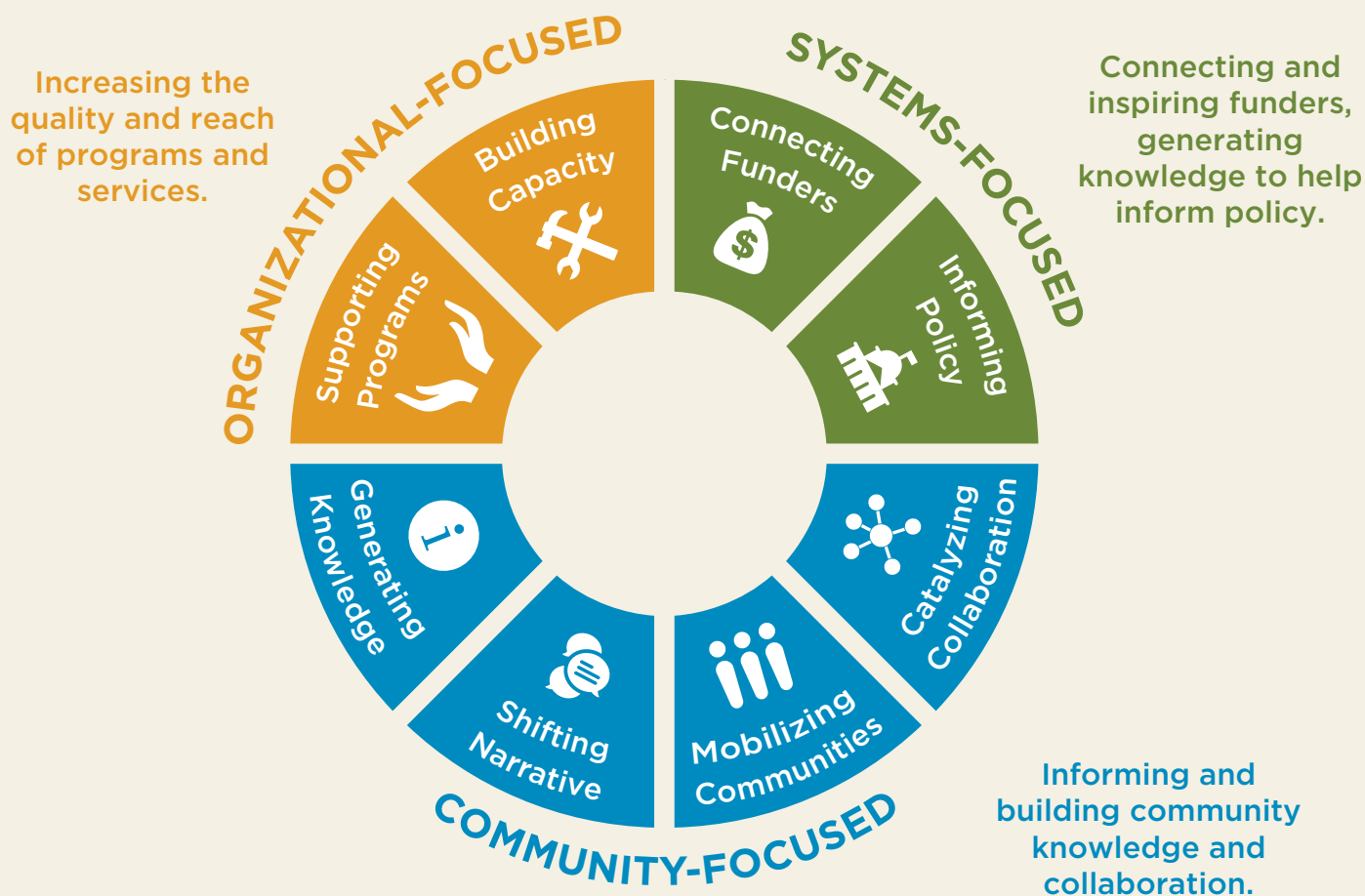
Efrain Balmes, who co-owns Sonoma Eats in Sonoma, turned to La Luz Center, a CFSC grantee, for support in keeping his restaurant afloat through the pandemic with a small business micro-loan.

At Community Foundation Sonoma County, we believe in the power of philanthropy to change communities for the better.

We know the best solutions to our region's most pressing issues are often found when we work together and collaborate across all sectors of our community, from philanthropy to business, nonprofit, and governmental organizations.

That's why we approach this work in three key ways: making grants to **strengthen our nonprofit community**, supporting collaborative community-wide efforts that **catalyze change**, and supporting initiatives that are working to **address the systemic issues** behind our region's most pressing issues.

Our approach is



COMMUNITY FOUNDATION SONOMA COUNTY 2021 Financial Summary

TOTAL
ASSETS

\$227M

TOTAL
CONTRIBUTIONS

\$15.7M

TOTAL
GRANTS

\$15M
to 547 nonprofits

1983

\$275,342,500

2021

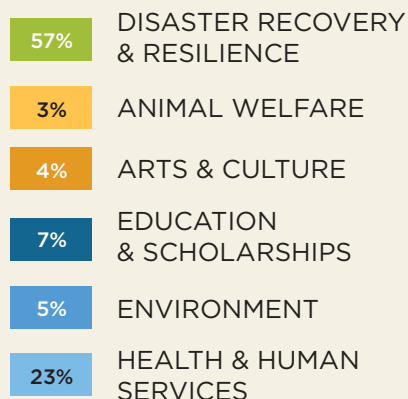
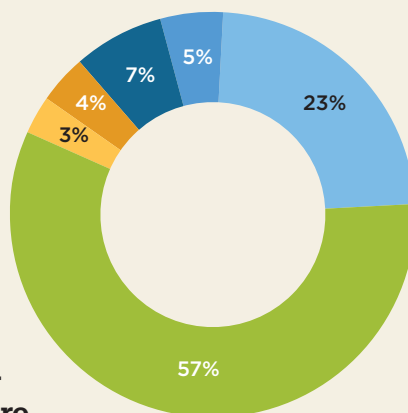
TOTAL GRANTS AWARDED

Community Impact Grants

\$4M

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

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

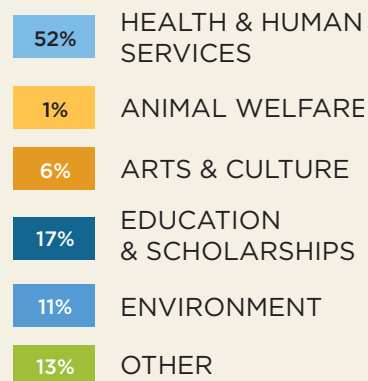
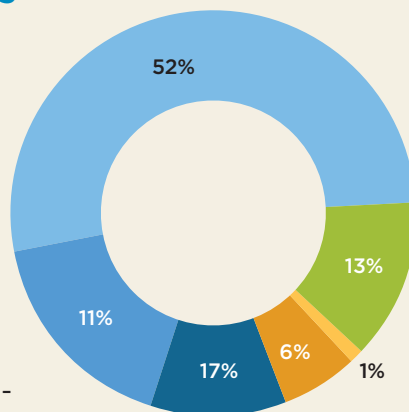


Donor Advised and Other Grants

\$11M

CFSC awarded \$11 million in grants in 2021 on behalf of our passionate and generous donors. **90% of these grants went to organizations working here in the Bay Area.**

Our donor advised fund payout rate for 2021 was 19%. Payout rates comprise the amount distributed across all donor advised funds collectively.



2021 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 donors are able to grow their investments and grants. This table illustrates our pools' performance, net of fees, as of Dec. 31, 2021.

	Pool Assets	YTD	1 Year	3 Years*	5 Years*	Since Inception*	Date of Inception
LONG-TERM POOL							
Long-Term Pool	\$138.4M	12.36%	12.36%	16.36%	11.66%	7.15%	2/1/1997
Composite Benchmark		12.11%	12.11%	14.98%	10.82%	6.71%	
ENVIRONMENTAL, SOCIAL, AND GOVERNANCE (ESG) POOL							
ESG Pool	\$35.9M	12.62%	12.62%	15.38%	11.07%	6.00%	6/1/2001
Composite Benchmark		12.16%	12.16%	15.09%	10.81%	6.77%	
INTERMEDIATE-TERM POOL							
Intermediate-Term Pool	\$24.6M	3.84%	3.84%	8.73%	6.28%	4.13%	8/1/2003
Composite Benchmark		3.61%	3.61%	7.88%	5.94%	4.89%	

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





Local Impact: \$2M+ covid relief grants

Inspiring philanthropy

IN HEALDSBURG & THE SONOMA VALLEY

At CFSC, as we worked to innovate our grantmaking in light of the coronavirus crisis, we asked a critical question: How could we inspire more people to give?

We knew our regional affiliates—Healdsburg Forever and the Sonoma Valley Fund—were already doing incredible work in their local communities. And we knew they had great ideas about addressing the pandemic's challenges. So we offered to give each community a \$150,000 challenge grant to help make those ideas real.

We hoped our challenge grants would inspire other donors to give and ensure our collective impact would be stronger.

The result? **An outpouring of generosity.**

In the Sonoma Valley, volunteers from our Sonoma Valley Fund and the broader community teamed up to create the **Sonoma Valley Catalyst Fund**. This novel effort enlisted a diverse volunteer team to raise funds, reach out to Valley nonprofits, and fund projects quickly—helping nonprofits meet Sonoma's overwhelming needs during the crisis.

Starting with the challenge grant from CFSC, the Catalyst Fund innovated a new, collective funding model, raising more than \$1.6 million from more than 125 donors.

To date, they have awarded 44 grants, filling gaps nonprofits could not bridge without extra support. Grants helped ensure people

affected by COVID in the Sonoma Valley would not go hungry and could access vaccines when they were ready.

In Healdsburg, board members from our regional affiliate **Healdsburg Forever**, leveraged our challenge grant into a similarly successful fundraising campaign that, with the collective generosity of donors, provided 14 grants for essential services in the Healdsburg and Geyserville communities.

Since 2020, Healdsburg Forever has awarded 34 grants totaling \$887,000 to organizations working across six impact areas prioritizing food insecurity, healthcare, housing, support for Latinx communities, senior services, and youth/education.

“We trusted nonprofits to address the most critical needs for the people they serve,” said Carol Beattie, chair of the Healdsburg

Forever board. “We also built new relationships with some major donors, who entrusted us to make those grant decisions based on our knowledge of where those dollars would help the most.”

“Sonoma Valley is in such better shape because of the work we did,” said Rebecca Hermosillo, a member of Catalyst’s steering committee. “We changed the community we live in. It’s amazing to impact so many people, and so many people of color, when they really needed it.”

With this track record of impact, the volunteers at the Sonoma Valley Catalyst Fund and Healdsburg Forever are keeping their eyes on the future, continuing to fundraise on behalf of their communities, and continuing to support the nonprofits that keep our communities thriving.



To learn more about Healdsburg Forever, please visit healdsburgforever.org.



It takes a county **LEARNING FROM STUDENT FEEDBACK**

“YouthTruth is changing how sites and districts do school,” says Jessica Progulske of the **Sonoma County Office of Education (SCOE)**.

The YouthTruth survey is a national effort to gather student and stakeholder feedback to inform school improvement. It asks students, teachers, and parents about a range of issues, including engagement, relationships, culture, belonging, college and career readiness, and mental health.

While the idea to bring YouthTruth surveys to our region was first raised—and funded—by the **Hewlett Foundation** in 2017, this initiative has been a truly collaborative venture from the start, with CFSC acting as a local partner with the Hewlett Foundation and, later, bringing the **Career Technical Education (CTE) Foundation** to help foster school participation.

“We immediately saw the promise in the data,” says Karin Demarest, CFSC’s vice president for community impact. “Understanding what students are facing helps funders be more impactful, especially as we learn how COVID and the local fires have affected youth.”

Over the past several years, CFSC, and other funders, including SCOE, have provided significant funding to expand the surveying efforts from five schools and 4,500 students in 2018, to more than 60,000 students, teachers, parents, and guardians at 130 schools in 2022.

Today, the YouthTruth surveys offer funders, schools, and community organizations the opportunity to make more informed funding decisions, guided directly by the voices of the people most affected.

DATA-DRIVEN CHANGE

Learnings from the survey are already influencing education-related efforts. SCOE developed an entirely new behavioral health department based on YouthTruth results showing that students need more support around mental health.

According to Jessica, who is SCOE's director of data and engagement, YouthTruth data also plays a key part in how school districts allocate their state funding. "In Windsor, for example, they shifted some of their priorities to hire more counselors as a result of the YouthTruth data," she says.

"Literally, what a district decides to do—how they decide to hire who they hire, what services they provide, and how they spend their money—is being informed by the YouthTruth survey."

COHORTS OF SUPPORT

Starting in 2022, partnering with SCOE and CTE Foundation, Community Foundation Sonoma County helped launch a three-year cohort program to support schools to take informed action. The cohort of 10 school site and district teams will work with community-based organizations and industry partners to implement new programs and activities targeted to address issues discovered in the data.

"We see an opportunity to match and support these schools based on the data they're receiving around engagement, relevancy, and college and career readiness," explains Kathy Goodacre, CEO of the CTE Foundation. "If they need employers to come in and work with them to help address and improve this—that's our role. The Community Foundation is also helping to rally and bring together community-based organizations that can support schools."

"Schools will not be alone, as they often have been in the past, in trying to figure out how to do school differently," Jessica says. "They'll be supported by folks from our community who have expertise in their area

of focus to try to enact meaningful change."

PARTNERSHIPS IN PRACTICE

Each cohort member is using the data to establish a singular area of focus where they hope to make a change.

At the **Sonoma Valley Unified School District**, for example, a cohort of site- and district-level administrators and counselors are looking at the responses to questions about belonging and peer collaboration. They hope to understand how they can better support students who reported earning mostly D's or below and will be focusing on improving teacher-student relationships by fostering connections at school.

To support innovative approaches to



addressing these areas of focus, CTE Foundation and CFSC will bring in industry and community partners to support schools in identifying and implementing the changes they can make.

"We're very hopeful these partnerships will have a meaningful impact," Karin says. "I hope our donors and other people who care about youth will look at the data and try to help, too. We can't expect schools to fix everything. We need to take action as a community—this is all of our responsibility."

To learn more about the YouthTruth survey, please visit sonomacf.org/youthtruth.

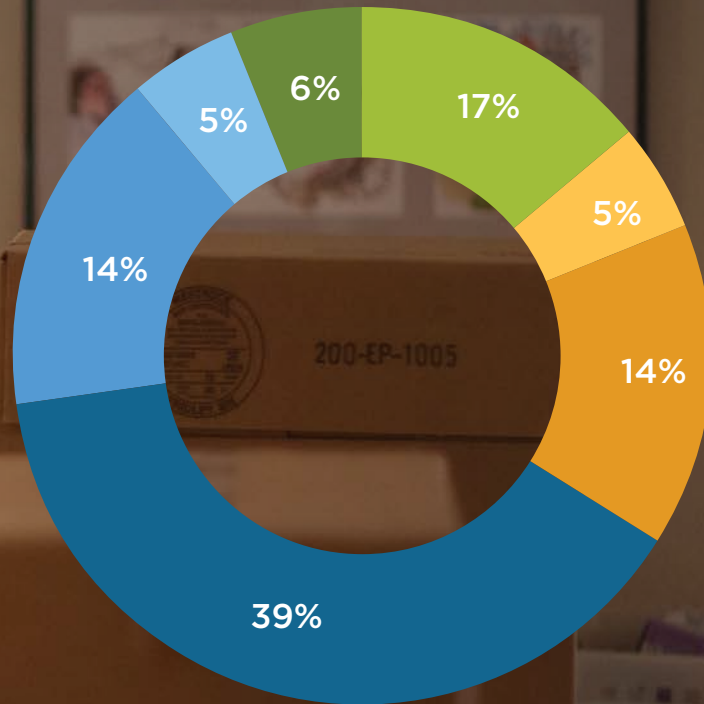
The Sonoma County *Resilience Fund*



A worker at The Living Room, a CFSC grantee, helps prepare supplies to be sorted into hygiene and food packs to support the needs of houseless individuals who come to The Living Room for services.

Over \$16.6 million in grants since 2017*

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



14%	\$2,389,000 COVID RECOVERY
5%	\$730,000 WILDFIRE EMERGENCY GRANTS
15%	\$2,542,000 HEALING & TRAUMA
39%	\$6,542,000 HELPING INDIVIDUALS
16%	\$2,657,000 HOUSING SOLUTIONS
5%	\$839,000 PLANNING, RESEARCH, & CONVENING
6%	\$961,000 PREPAREDNESS

*Grant totals through May 31, 2022



Healing

RN Jaclyn Ramirez helps a patient who attended a drop-in clinic in Cloverdale. The program is offered by Reach For Home, a CFSC grantee, through their Community Health and Wellness Mobile Unit.

Planning & Research

Last year, we were proud to sponsor the
Portrait of Sonoma 2021 Update.

This crucial report provides a detailed picture of where disparities persist in our county and will help shape our strategies for how and where we can make a difference.

What the Portrait measures:



**A Long and
Healthy Life**



**Access to
Knowledge**



**A Decent
Standard of Living**

Read the Portrait on our website at sonomacf.org/portrait, and join us in working toward a more equitable community.

A brown horse is grazing in a field of green grass and dry, yellowish-brown grass. In the background, there are rolling hills under a clear blue sky. A fence and some trees are visible in the distance.

Looking ahead

As we continue to support our community's recovery from recent disasters, we're also looking toward the future.

Where can we proactively reduce harm and risk from climate impacts?

Where can we best make an impact with our grants?

Our focus areas: align with the unique needs of Sonoma County, already have emerging, innovative programs, and have the potential to leverage additional investments.

Our 2022 Climate Resilience grants program, supported by the Resilience Fund, will bolster our ability to reach local climate goals while centering on the communities most acutely affected by climate change.

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 BOARD

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Maria Sosa Ramos
Sr. Philanthropic Advising Intern

Abby “Tiny” Torrez
Executive Assistant and Board Liaison

Annette Williams
Community Impact Coordinator





A nurse at Alliance Medical Center, a CFSC grantee, delivers a life-saving first dose of the COVID-19 vaccine to a patient at a pop-up clinic for low-income and uninsured people in Healdsburg.

Cover photo: Clients of Coastal Seniors, a nonprofit serving isolated seniors who live on the rural Sonoma County coast, arrive to pick up hot meals to take home from a weekly food pick-up hosted by the organization in Fort Ross.

COMMUNITY
FOUNDATION
SONOMA
COUNTY



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