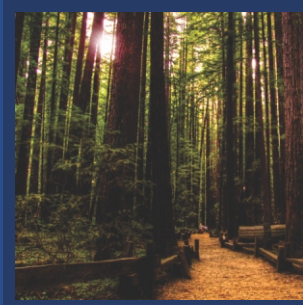




COMMUNITY FOUNDATION SONOMA COUNTY

Thirty Years of Giving

1983 TO 2013



*Thirty Years
of Giving*



Sometimes we receive more than we give...

When you cast a stone into the waters, you never know how far the ripples will spread.

My father was an avid reader, particularly in philosophy and world religions. So when he died in 1973, his widow asked that people wanting to make memorial gifts contribute them to the Mill Valley Public Library.

Many people did that, and the library bought about 75 books, all of which carried a book plate with his name.

Sometime in the 1980s, I wanted to do something more significant for the library and asked the librarian if there was something missing from their program that would benefit from a steady stream of income of \$1,200 to \$1,500 a year. She said they would love a stipend to bring in a variety of story tellers whose programs would reach out and attract the 11- to 14-year-old age group and their parents.

In honor of my father, I created the Archer Baxter Forsyth endowment through the Community Foundation Sonoma County to benefit the Mill Valley Public Library.

Fast-forward to 2002: My father had lost contact with his two children of a first marriage, born in England in the 1920s. I knew of their existence, but never thought I could find them. Imagine my surprise when in 2002 I received an e-mail from an Ian Forsyth in England saying, "I think we may be related."

We were indeed related. It turned out that Ian is my nephew, the son of my half-brother, Stuart Forsyth. How did Ian find me? He was using the Internet and discovered the library fund. There are hundreds of Archer Forsyths in the United States, but only six with the middle name Baxter, my grandmother's maiden name. The Community Foundation connected us.

Meeting and getting to know Stuart and his family has enriched my life, and I believe I owe it all to the act of setting up the endowment through the Community Foundation, because that is what made it all possible. Thoughtful acts do indeed bring surprising consequences.

Ian F. Schulz

COMMUNITY FOUNDATION SONOMA COUNTY

Thirty Years of Giving

1983 TO 2013

JEAN SCHULZ
and CAROL BENFELL

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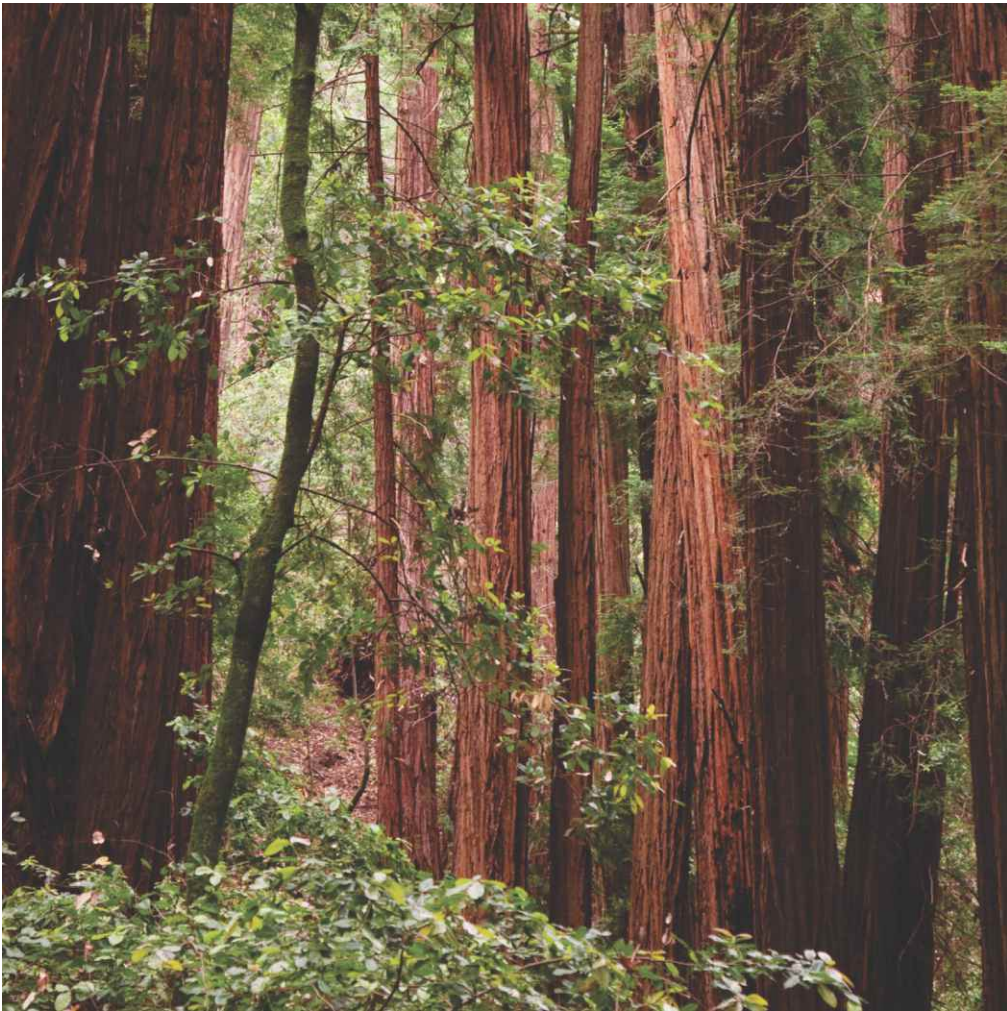
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Historic Documents:

The historic documents pertaining to each chapter are available in the online version of the book available for download at Sonomacf.org.

Rick Rhay Photography (iStock)



The Community Foundation provided funding to the Stewards of the Coast and Redwoods for the protection and restoration of the Armstrong Woods State Natural Reserve.

Introduction

Jean Schulz, Founding Board Member

In 2008, as the Foundation passed its 25th anniversary, the board engaged in a strategic planning session, looking ahead at the years to come. I realized during that exercise that board members, in striving to look forward, were unable to look back. They didn't know where the Foundation had come from or the struggles and lessons learned in 25 years of engagement with a diverse and changing Sonoma County community.

This history is written for those board members, and all those who will be board members in the future, so that as they look forward, they can do it with an understanding of the firm foundation built by their predecessors over a quarter of a century.

It is also written for donors and members of the community interested in knowing how Community Foundation Sonoma County has grown from a virtually unknown nonprofit to a major force in Sonoma County charitable giving.

It is the story of a grassroots effort by a growing number of people who believed that they could help make Sonoma County a better place to live.

The Foundation began because of the passion of its founding board members, who were excited about building a legacy for the community. They were people who believed in stewardship, and believed that their work at the Foundation was in trust for the future. The Foundation, they knew, would help others do their own good works. As new members joined, the expertise and enthusiasm of the board grew exponentially.

Those early years were a tremendously exciting and creative time because the only direction we could go was up. We could shoot for the moon, and we did, with the confidence that we were doing the right thing. We were always bouncing ideas off each other, giving and sharing, knowing that no one had a monopoly on good ideas. We kept going back to expert resources when we had questions, including the Council on Foundations, which guides and encourages foundations of every size at every level of development.

I particularly remember carefully orchestrating a meeting at the old Wells Fargo building (off Hopper Avenue), where we invited interested nonprofits to learn about our grant-giving criteria. We had to explain everything, from how to apply for a grant to our philosophy of giving, while keeping our language direct and simply stated. At the end of the presentation, we fielded more than an hour of questions from the 125 people who attended. It was the way information was disseminated in those days before the onset of computers. We were hands-on and helped applicants through the complex task. As we learned, we shortened our application process and worked to make everything more easily accessible.

Later, we began including all board members in at least one site visit to potential grantees, so they would understand our responsibility to our donors and how we administered our grants to the community. We continued working. Almost before we knew it, we were a multimillion-dollar foundation whose work touched every aspect of Sonoma County life.

We took seriously the wisdom of Bill Somerville, one of our early consultants and a nationally recognized expert on grantmaking, who called community foundations the “motorcycles of philanthropy” because they could move more nimbly than the limousines of larger funding organizations.

We were born because of a vision: We wanted to benefit all the people of Sonoma County, in every area of the county, by tackling the issues that affect us all: education, arts, health and human services, and the environment.

We wanted to create true partnerships, bringing generous donors together with groups and organizations that meet community needs. We understood that every community is unique, and each community foundation must find its own unique approach to meet those needs through its grants and community initiatives.

We grew because we continued to foster a quality team with high ideals. We looked to the wisdom of experts, locally and nationwide, who taught us that foundations should be built on long-term thinking rather than short-term results; that their boards must provide checks and balances as well as expertise; and that they must always concentrate on the community they serve.

When Kay Marquet became our president and CEO, we gained the benefit of her years of experience. She helped us professionalize our internal policies and showed us creative ways of reaching out to donors and stepping up to meet community needs.

Looking back, after more than a quarter century, the hopes, dreams and hard work of board members through the years can be seen in the impact the Foundation has had on Sonoma County and its residents.

Our thousands of grants to hundreds of organizations and individuals have enriched and changed the lives of people all over Sonoma County.

Our efforts, and the trust we have inspired in donors, have resulted in major achievements such as Chop's Teen Club for Santa Rosa youth, the Samuel L. Jones homeless shelter, the preservation of Pepperwood Preserve and the Oliver Ranch, and a permanent endowment to support the arts.

No less significant were the myriad small grants, strategically placed, that kept charitable organizations alive or inspired them to do more: emergency grants to Russian River nonprofits after the disastrous floods of the early 1990s, the Graton Day Labor program, the Cloverdale Old Time Fiddle Festival, and scholarships for hundreds of economically challenged students.



Photo: Jill Catherine Newman

We also helped the community in other ways, such as serving as a fiscal sponsor for the renovation of the gazebo in Healdsburg Plaza, and for the installation of the statues of Snoopy and Charlie Brown in Railroad Square. We sponsored heritage festivals that brought arts groups together from all over the county, and supported the Cinco de Mayo celebration in the Roseland community.

We took seriously the wisdom of Bill Somerville, one of our early consultants and a nationally recognized expert on grantmaking, who called community foundations the “motorcycles of philanthropy” because they could move more nimbly than the limousines of larger funding organizations.

I'm very proud of the Foundation and the efforts of everyone involved. We have been honored to be able to serve and to add to the meaning of “community” in this beautiful county.

This history is dedicated to all the people who have brought us this far, and I am grateful to all those who gave their time to be interviewed for this history.

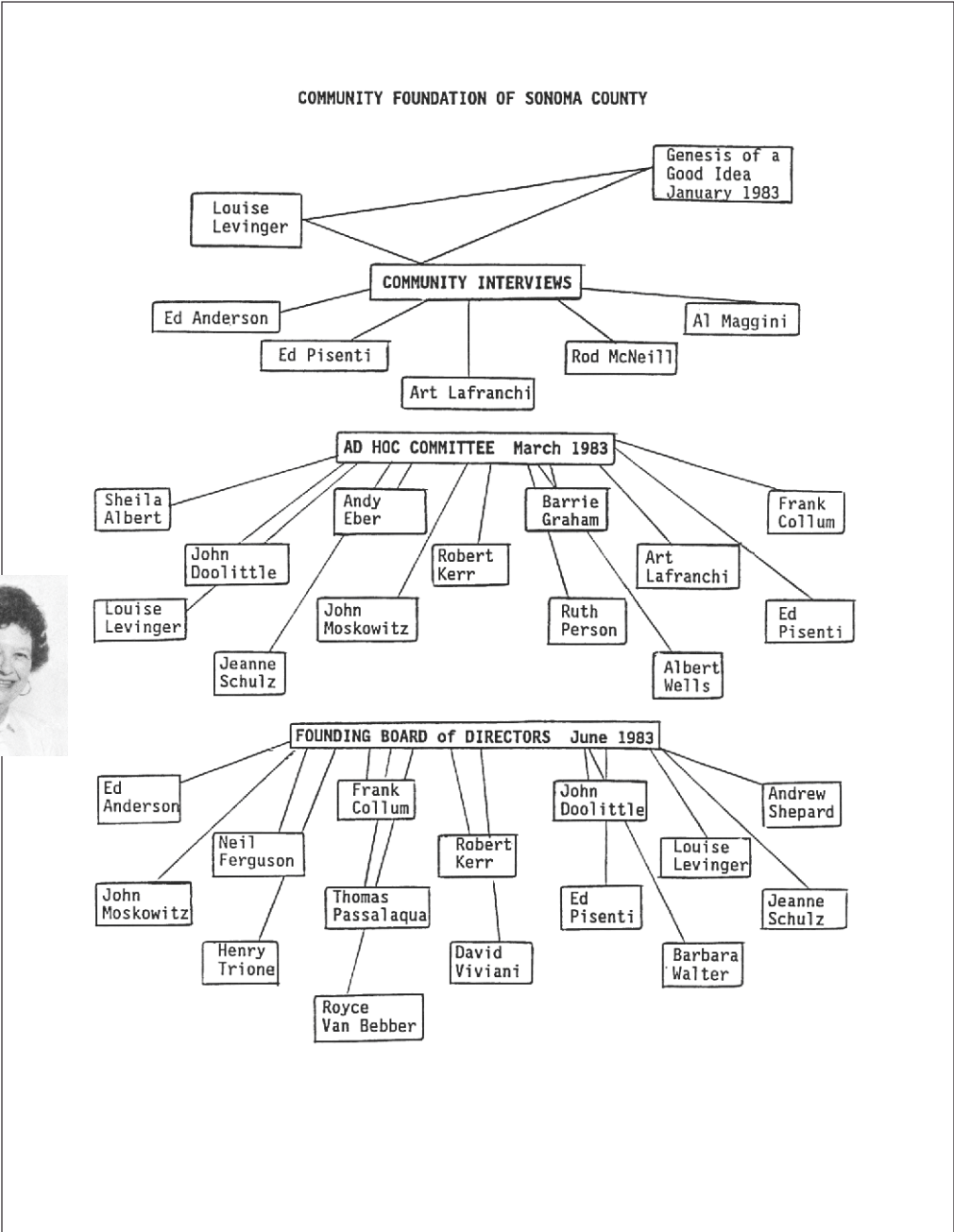


J. Barrie Graham, then the executive director of United Way, served as board treasurer when the Foundation first began.

Graham recalled a fundraising event when Charles “Sparky” Schulz asked him about his involvement in the Community Foundation.

“I said I was the treasurer, and Sparky said, ‘How can you be a treasurer when there isn’t any money?’ and I told him, ‘Maybe that’s why they allow me to be the treasurer.’”

A few months later, Graham received a signed “Peanuts” cartoon from Charles Schulz. It was a spoof of the Community Foundation’s dilemma, with Spike, Snoopy’s brother, as treasurer of the Cactus Club. “It’s one of my most prized possessions,” Graham said.



The Community Foundation Sonoma County's first organizational chart.

1 *The Vision*

(1983 to 1985)

The year was 1983, and the nation—and Sonoma County—were still reeling from what was then the worst recession since the Great Depression. As the economy worsened, the Reagan administration had enacted sweeping tax cuts and massive reductions in social services.

Nonprofit organizations working in the field of human services were hardest hit. Many of them relied on United Way for supplemental funding, but United Way earmarked most of its money for existing nonprofits and programs. Only limited funding was available for innovative new programs.

In Santa Rosa, community-minded individuals concerned about the city's quality of life began looking for ways to maintain human services, support new programs and serve other community needs, such as the arts and the environment.

Santa Rosa was then a moderately compact city of 83,000 people, where a small group of community leaders, all of whom knew each other or of each other, were the movers and shakers in civic and charitable life.

“It was a small town. You'd go into the grocery store and you knew everybody,” recalled Irv Rothenberg, a principal at Wealth Management Consultants LLC and a longtime member of the Foundation's Investment Advisory Committee.

So it was that Louise Levinger, a driving force in the Santa Rosa philanthropic community, and Jean Schulz, who sat with Levinger on the United Way's allocation committee, met one morning with Barrie Graham, the executive director of United Way, to discuss an entirely different plan for funding nonprofits.

At that time Levinger had been meeting with the “Lunch Bunch,” a group of human service administrators who gathered informally to discuss civic issues, said Andrew Eber, then executive director of the county's Human Services Commission and a member of the Lunch Bunch himself.

After much research and discussion, the group had become convinced that a community foundation serving Sonoma and Mendocino counties was the best way to generate additional private giving, Eber said.

Unlike the annual fund drives used by most charities, a community foundation would invite donors to create permanent endowments. The endowments would be invested and managed by the community foundation, and the interest and other proceeds from the endowment would be used to fund needed programs in perpetuity.

It made perfect sense to Levinger. She approached Graham, hoping to make clear to him that a community foundation would supplement, not compete with, United Way.

The mission of the Sonoma County Community Foundation is to provide, in perpetuity, for the enrichment of the quality of life in Sonoma County by: encouraging philanthropy throughout the community; providing a service and vehicle for donors with varied interests and at various levels of giving; assessing and responding to emerging and changing community needs and opportunities; serving as a resource and catalyst for charitable activities; developing a permanent endowment for the community.

“She wanted to create an endowment that would provide a permanent source of funds. The funding would not be susceptible to the economy, and could be used for projects that United Way wasn’t funding,” recalled Graham, vice president at WR Hambrecht + Co. “Louise was very serious about projects to combat violence against women. The YWCA had developed a women’s shelter and a children’s home, but they were struggling for funds. Louise used that as an example of how an endowment could help up-and-coming nonprofit organizations, where that would have been a challenge for United Way.”

By the end of the meeting, Graham had agreed to become treasurer for an ad hoc group organizing the community foundation. The group consisted of about a dozen people, including several members of the Lunch Bunch, and met regularly over the summer of 1983.

Levinger and Jean Schulz, the wife of famed “Peanuts” cartoonist Charles “Sparky” Schulz, knew each other well. Both served on the boards and committees of the Volunteer Center as well as United Way. Both had an extraordinary commitment to community service.

The Schulz family had already established a private foundation for their charitable giving, but Jean Schulz recognized immediately that a community foundation with a permanent endowment would have a broader reach. It could become an ongoing source of funds to address both entrenched needs and new opportunities.

It also offered some very real advantages to donors. Foundation staff and volunteer committees could research potential recipients for donors who lacked the time and expertise to do that. A community foundation could free donors to concentrate on giving, by managing their investments for them.

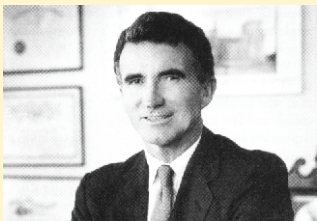
Levinger met with attorney Ed Anderson, a partner in the Anderson, Ziegler law firm. He was doubtful a community foundation could work. “Initially, I was kind of negative about it,” Anderson recalled.

Undaunted, Levinger came back several months later and explained her idea in more detail. “She was quite persuasive,” Anderson said. “She had talked to a lot of people, and it seemed to me that she had some pretty good ideas. She talked about creating a board and asked me if I would take that on.”

Anderson advised the group as the foundation went through the legal process of becoming a nonprofit organization. He became one of its founding board members and hosted several fundraisers, including a tennis tournament and a book signing.

Soon others prominent in the community were persuaded to join the effort. United Way donated office space, secretarial help, a telephone and bookkeeping services. “The Community Foundation was just an idea at that point, so the cost was very modest,” Graham recalled.

The first meeting of what would become Community Foundation Sonoma County took place on September 1, 1983, in the conference room at United Way. It had \$9,000 in start-up money and a 15-member board: Ed Anderson, attorney;



“The Sonoma County Foundation meets the present and future social, environmental and individual needs of the citizens of Sonoma County. I support the Foundation because its goals will benefit all our citizens.”

Ed Anderson

Frank Collum, trust officer; John Doolittle, retired telephone company executive; Neil Ferguson, retired banker; Robert Kerr, real estate; Louise Levinger, community leader; John Moskowitz, attorney; Thomas Passalacqua, attorney; Ed Pisenti, CPA; Jean Schulz, community leader; Andrew Shepard, Exchange Bank president; Henry Trione, winery owner; Royce Van Bebber, steel supplies owner; David Viviani, Cheese Factory owner; and Barbara Walter, community leader.

The board defined its goals in the Foundation's first mission statement: "The mission of the Sonoma County Community Foundation is to provide, in perpetuity, for the enrichment of the quality of life in Sonoma County by: encouraging philanthropy throughout the community; providing a service and vehicle for donors with varied interests and at various levels of giving; assessing and responding to emerging and changing community needs and opportunities; serving as a resource and catalyst for charitable activities; developing a permanent endowment for the community."

"I thought the community foundation concept was a good one," said Ed Pisenti, a founding board member and a partner in Pisenti & Brinker LLP. "A lot of people don't care for large national organizations with huge administrative costs. The Community Foundation looked like a place where administrative costs would be minimal, and we could attract people who wanted to accomplish specific charitable goals without having to set up their own foundations."

Art Lafranchi, a former partner in the Friedemann Goldberg law firm, joined the board shortly after its creation. He had been a United Way board member, but felt strongly that the cost of annual fundraising drives took too much money away from actual giving. He thought an endowment could be much more effective, because it provided annual funding without the necessity of annual fundraising.

"The Community Foundation had the potential for raising a great deal of endowment money, not just annual money like United Way, but a large amount of money that could be operated very frugally, would be around forever, and could be used for a wide variety of purposes," said Lafranchi, who served as board president in 1987.

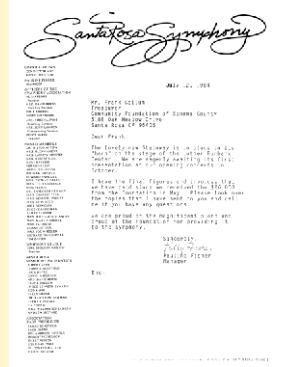
It was difficult, however, to convince potential donors that the fledgling foundation could deliver what it promised. "It was a slow, slogging process," Pisenti said.

Levinger worked tirelessly to interest other community leaders, while Schulz worked quietly in the background, underwriting the Foundation's expenses. The issue wasn't just raising money and investing it, but raising enough money so that grants could be made from the investment's payout and the principal would remain untouched.

"Louise had the idea for the community foundation, and Jeannie soon became the driving force," said Kay Marquet, who became president and chief executive officer of Community Foundation Sonoma County in 1992.

In 1984, the Community Foundation began making its first grants.

Jean Schulz persuaded Rolf Illsley, cofounder of Optical Coating Laboratory, Inc., to donate \$10,000. “We recognized we needed to give grants in order to get newspaper attention,” Schulz said. “We made four \$1,500 grants, one in each of our areas of interest—arts, the environment, education and human services—and in different areas of the county. We put the rest into our endowment.”



Levinger, a supporter of the arts, suggested a highly visible grant—a grand piano for the Santa Rosa Symphony. The Symphony had been using Santa Rosa High School’s grand piano, trucking it back and forth between the high school and performances at the Luther Burbank Center for the Arts. The frequent moves were expensive and creating wear and tear on the piano.

So in 1984, the Community Foundation, with money from the Schulz Foundation, donated \$34,346 to the Santa Rosa Symphony to purchase a grand piano—a contribution duly noted in the newspapers. It was a Hamburg Steinway, a “piano with a soul,” according to Polly Fisher, then manager of the Santa Rosa Symphony. The grand piano is still in use and moved with the Symphony to the Donald and Maureen Green Music Center at Sonoma State University.

That same year, the Santa Rosa Foundation, created in 1932 to manage a bequest from businessman Leonard Howarth, merged with the Community Foundation, bringing with it nearly \$90,000 and a 52-year history of local philanthropy.

The community was too small for two foundations, and the Community Foundation could serve a broader community with a broader vision, explained Harrison Comstock, then president of the Santa Rosa Foundation, and later a Community Foundation board member.

The merger gave a real boost to the new Foundation. “To me, the merger tied our new venture to the history of Santa Rosa. It felt as if it assured our success,” Schulz said.

Jean and Charles Schulz were the Foundation’s major contributors in those first years, donating money to start new programs and demonstrating their faith in the Foundation to other community leaders. “Without Jeannie and Sparky’s money, we wouldn’t be here today,” said Marquet.

Other donors came to the table, but endowment growth was still slow.

“I remember John Moskowitz, president of the board at that time, hitting his fist on the table and saying, ‘We’ve got to find some way to get some donations,’” recalled board member John Shanahan, then manager of the Microwave Technology Division at Hewlett-Packard.

Shanahan had just agreed to join the board when, during his second board meeting, directors decided that each board member should donate \$10,000 as an example to others in the community. He wondered if he should withdraw because he didn’t see how he personally could come up with \$10,000.

“It was a good strategy, but it caught me. Finally I decided it wasn’t too difficult to accomplish, and I arranged a \$10,000 donation of computers from HP,” Shanahan said.

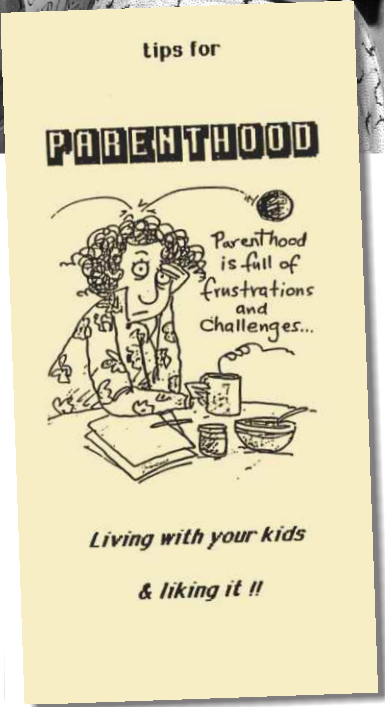
It was touch and go during those early years, and even board members occasionally had their doubts. Yet Schulz and Levinger persevered. All those interviewed for this history said the Foundation would never have endured without the dedication of those two women.

“Many, many organizations lose focus and interest because people lose interest because the organization has no money,” said Graham. “Jeannie and Louise had the vision and the faith to believe that in the end, the money would be there.”

Photo: Community Foundation, L – Nancy Dobbs, R – Virginia Hubbell, Kid Connection, 1987



In 1987, the Community Foundation established the Parent Education Project.



2 *Gaining Visibility*

(1986 to 1991)

By 1986, it was clear to board members that the Foundation needed a full-time executive director to concentrate on fundraising and build public awareness.

Board member Barrie Graham headed the search committee. After 55 applicants and numerous interviews, the committee recommended, and the board hired, Virginia Hubbell, a Sonoma woman with a background in philanthropy and the arts.

“At this point, we realized if we really wanted to grow, we would need to have a professional fundraiser,” Graham said. “Virginia Hubbell had a background of working with foundations. I found her very engaging and knowledgeable about the foundation world, at which we were novices.”

The Foundation had about \$400,000 when Hubbell became its first executive director. “Louise Levinger had stirred up the troops, and a board had been formed. Jeannie Schulz was contributing to organizations and agencies through the Community Foundation. But nobody in the community, other than the board members, had ever heard the term ‘community foundation.’ We were starting from an absolutely blank canvas,” Hubbell said.

She began work in space donated by Simons & Brecht architects, bringing paper, pencils and other office supplies from home. “We started with a phone and a desk,” Hubbell said. “It was an exciting time. Everyone was trying to figure out how to be helpful. Louise’s passion kicked us off, Jeannie Schulz was a rock, and I had good guidance from the professional people on the board.”

It was a period of learning and experimentation. Board members tried to learn from the successes of other community foundations by bringing in speakers and attending conferences. They searched out, and found, innovative and affordable ways to reach out to the community.

“We struggled in those early days,” said John Shanahan. “Virginia had us doing all kinds of fundraisers. She knew a lot of people in the city of Sonoma, and we were over there in wineries and art galleries.”

One early effort was a series of “Breakfast Briefings” for attorneys where guest speakers talked about charitable giving.

Later, Hubbell organized brown bag lunches for financial advisers, estate planners, CPAs and anyone else who might advise a client about charitable giving. She asked Irv Rothenberg and John O’Brien, a partner in the O’Brien Watters and Davis law firm, to help her reach out to those who might be interested in attending.

“At the time, very little was being done with planned giving,” said O’Brien, who became a Foundation board member in 1991. “Somebody might give something to the university, but the concept of an endowment was not really known or used that much. If we could educate the advisers, they could talk to their clients about opportunities.”



“I continue to be very proud of those early programs, like the Parent Education Project, the National Endowment for the Arts challenge grant program, the heritage festivals in town squares across the county, the Basic Human Needs Fund, etc.”

Virginia Hubbell
First Executive Director
1986–1992

The lunches began small, with 10 to 15 people, but have grown through the years, O'Brien said. "The Professional Advisory Group is still going strong, and it's still very active, even though most people in financial planning have a better knowledge of estate giving techniques than they did back then."

The board also sought to raise public awareness by giving small grants, strategically chosen for their impact, to a wide variety of organizations. Some of these early grants included \$1,500 to the Sonoma Vintage Theater for stage lighting, \$300 to the Family Education Center for a tape recorder, \$1,600 to Home Care Connection for a photocopier, and \$1,000 to the Valley of the Moon Natural History Association to cover printing costs for a history pamphlet.

At Schulz's suggestion, the Foundation also began offering mini-grants to organizations with even more modest needs.

"The project had to be for a nonprofit purpose, but the group simply had to show cohesion and the ability to carry out the project. They did not need to have a 501(c) designation. We gave money for small things, for instance, to paint a church or clean up a neighborhood," Schulz said.

The Foundation also started youth endowment funds, in which a parent or grandparent could put a minimum \$1,000 into a fund for a child or grandchild. The youngster would then learn about community needs and decide where the annual payout would be donated.

Hubbell designed the program at the direction of the board, using the ideas of young children—including her eight-year-old daughter—in its creation. "The children picked out four child-related organizations from the Foundation's grant list, and wrote from their own perspective about why these programs were important. This background material was then available to child donors, and helped them choose where their small funds would go. It was a radical idea in its time, and certainly helped the Foundation focus on the next generation," Hubbell said.

"I thought it was a wonderful idea," Schulz said. "I set up funds for each of my grandchildren."

Schulz donated money to establish other funds as well, hoping her example would encourage others to follow, Hubbell said. "Jeannie started the operating endowment, the donor-advised funds, the designated funds, the youth funds and the challenge grants. She wanted to set an example by giving in all different kinds of ways, including to the League of Women Voters fund, the San Francisco Cartoon Art Museum endowment and the Women Pilots' Aviation scholarship fund. Through her giving, we were able to establish many different vehicles that could then be used by other people."

As it looked for ways to benefit the community, the Foundation realized it could become a convener of interest groups—bringing together community groups involved in a specific issue and helping them work together.

"We looked for creative ways to serve our community, and we realized one of the primary things we could do was convening. That's common enough today, but back in the 1980s, there wasn't any organization that was bringing people together around a topic," said Schulz.

Santa Rosa in the late 1980s was undergoing a period of rapid growth that pit environmentalists against builders. City Hall became a battleground as new housing developments sprawled across fields and orchards in northwest Santa Rosa and crept up the grassy hillsides in northeast Santa Rosa.

At Schulz's suggestion, the Foundation convened environmental groups and builders in the conference room at Simons & Brecht to try to find some area of agreement and perhaps reduce the polarization occurring in the community.

"I was so proud of us," Schulz said. "We brought people together who hadn't known they were interested in the same issue. One of the developers at the environmental forum convening was Nell Coddington, a principal in Coddington Enterprises. It was plain in discussions that the community developers also valued the environment and wanted to maintain it."

There were no immediate results, but the convening changed the dialogue between builders and environmentalists, Schulz said. "Twenty years afterward, the Coddingtons hosted a climate protection meeting at their home where builders discussed their efforts toward 'green' construction. Coddington Enterprises also initiated the Sonoma Mountain Village, a model green project in Rohnert Park."

In 1987, Louise Levinger, one of the founding board members, suggested the Foundation do something for youth. A community advisory group was formed, and from those discussions came a decision to help working parents with child-rearing issues and to work with existing nonprofits to improve youth services overall.

The Parent Education Project would do something novel: Instead of expecting working parents to come to classes, it would take the classes to the parents. Question and answer sessions would be held at workplaces over the lunch hour or at another time convenient to working parents.

"The whole concept of parent education was kind of new. Parents didn't want to think they didn't know how to raise their kids, so we had to call the classes something else—parenting seminars," recalled Janet Bankovich, the project coordinator and now staff analyst at the Commission on Teacher Credentialing in Sacramento.

Initially, five employers opened their doors for the project: the Sonoma County Medical Association, Santa Rosa Memorial Hospital, two Hewlett-Packard office sites, the Sonoma Developmental Center and IMCO Realty Services.

The free classes were held once a week for four to six weeks, on such topics as improving communication, building self-esteem for parents and children, instilling responsibility in children and family problem solving. There was "homework" between the classes and parents would share their successes and frustrations in the following session.

By the end of the first year, nearly 400 parents had attended classes. The Foundation also pulled together a list of family-oriented community organizations and distributed that to an additional 1,000 parents. A Business Leaders Forum on Childcare was convened and well-attended.



Photo: Community Foundation

“It was a huge outreach,” said Bankovich. “I really felt we had helped kids have better lives. Parents were learning something, and human relations people at the businesses were learning how to help their employees. It also raised the Foundation’s visibility tremendously.”

The project’s success encouraged the Foundation to expand the program. Hubbell obtained a \$180,000 grant from the James Irvine Foundation to “develop and expand a countywide parent education project to reach diverse and hard-to-reach populations throughout Sonoma County.”

During this phase, the Foundation formed a parent advisory group in the Latino community, trained 100 parent educators in community agencies serving Spanish-speaking families and provided mini-grants to 43 other organizations seeking to offer new or expanded parent education services.

The Foundation also cosponsored a daylong symposium on child care issues, the first of its kind in the county. More than 100 local business executives and human resource managers attended.

“Parent education wasn’t happening at that time,” Hubbell said. “There were a lot of good people working in that direction, but there was no glue holding them together. We raised money to provide them with a sort of umbrella service. I’m very proud of that project.”

The innovative program caught the eye of national leadership, and a report on the project’s success became a case study in a seminal and still-cited book, *An Agile Servant: Community Leadership by Community Foundations*, published in 1989 by the Council on Foundations in Washington, D.C.

“The Parent Education Project was a novel and powerful idea in its day, and sadly, to the best of my knowledge, hasn’t been replicated since,” said Peter M. Krohn, MA, MFT, and one of the parent education presenters.

“The idea of going into the workplace at lunchtime, and offering parents an opportunity to improve parenting skills, and to express through humor and tears some of their stresses, was a hugely valuable service. I could feel the support in the room, see the benefits in their eyes, and hear the relief through their laughter. My hope is that these continued after we left the workplace, and were carried over in some way at home and in the community,” Krohn said.



Photo: Community Foundation

Another grant from the Irvine Foundation was used to strengthen the Foundation’s endowment and to sponsor a series of arts and community programs. These included heritage festivals in Healdsburg and Sonoma, where hundreds of people gathered to celebrate the diverse ethnic makeup of their communities. In Healdsburg, enthusiastic festival-goers filled the plaza and spilled out into a field across the street.

“It was the most fun I ever had working,” said Rue Furch, project manager for the Sonoma heritage festival. “We sent out mailings to cultural groups all over the county—Russian, Pomo, Thai, Irish, and on and on. Then we held a competition. The groups performed, and we decided which ones would be included. We had crafts, such as instruction in basket weaving, and each culture sold its traditional foods. It was wonderful!”

Another jump for the arts came in 1989, when the National Endowment for the Arts, with whom Hubbell had a prior relationship, offered the Foundation a challenge: The NEA would grant \$50,000 a year for four years to the Community Foundation to make grants in the arts. In return, the Community Foundation would have to add \$100,000 each year to its permanent arts endowment.

The Foundation met those goals, and its nest egg for the arts grew. After four years, the Foundation's arts endowment had increased by \$400,000, and it had distributed \$200,000 to arts organizations countywide. "It was very well supported. I think people were excited that there was a focused program to fund the arts into the future," Jean Schulz said. "Kudos go to Nancy Henshaw, who worked so hard on this."

Many Foundation projects, like the Parent Education Project, were initiated by board members.

Board member Schuyler Jeffries, a Santa Rosa city council member from 1981 through 1990, donated money left from his campaign to establish a leadership fund to recognize and train emerging leaders in the community.

The result was an annual Community Leadership Award program, launched in 1988 with \$250 honorariums to 14 individuals "whose deeds don't make it to the front page—people whose steadfast leadership rallies others to get involved in creating solutions to community issues."

One of those recognized, Herb Castillo, then director of the Immigration and Resettlement Office of the Santa Rosa Diocese, has now become a director of the Community Foundation.

"After dedicating several years of service to immigrant rights work, I remember the Foundation's Leadership Award as an honor for me as well as an acknowledgment of the contributions newcomers made to our community," Castillo said. "As a Foundation board member I understand how important it is for the Foundation to respond to emerging issues and to honor and support local leadership in responding to those issues."

Another example of board member activism was the Basic Human Needs Fund, which provided an emergency source of money for food, shelter and clothing for families needing assistance. Board member John Doolittle and his wife, Peggy, initiated the fund, while board member Peggy Bair and her husband, Russ, provided the initial funding of \$6,500.

The Basic Human Needs Fund also supported Innovative Housing, a shared housing project operating in Marin County, in which a large home would be rented to three or four low-income adults, usually women with children.

"Even though we didn't see the big steps, we kept moving forward," Schulz said. "We evaluated ourselves every couple of years, looking at what we were doing, and making adjustments as needed."

By 1992, it was clear that the worry, risks and hard work were paying off. Under Hubbell's stewardship, the Foundation's assets had grown from about \$400,000 to more than \$4 million.

But the Foundation was changing, even as it grew. The need to raise significant funds and the changing nature of Sonoma County required a shift in the Foundation's goals. Hubbell believed it was time for a new executive director, and prepared to return to her own consulting practice, Virginia Hubbell Associates, the Catalyst Group.

“My skills are in start-up. I'm a program developer and a catalyst person, and I think I was the right person for that time. But after six years, the model needed to shift,” Hubbell said. “I loved my time with the Community Foundation. I am immensely proud of what that first board of directors and our tiny four-person staff were able to accomplish. We put in place so many things that helped get the Foundation ready for significant growth.”

The board was searching for a new executive director in 1992, hoping to find someone who could build on what Virginia Hubbell had begun. It was not an easy task for the committee overseeing the search.

“Hiring a new executive director was an anxious time,” said John Shanahan, then board president. “There were five of us on the committee, struggling to determine who should replace Virginia.”

Hubbell, quite by chance, had met Kay Marquet at a national conference in Indianapolis. Marquet, the executive director of another community foundation, had been talking to a colleague about her decision to leave her position in Worcester, Massachusetts, and look for another job.

“Virginia spoke up and said, ‘You have to go to Sonoma County.’ I didn’t even know where Sonoma County was,” Marquet said. “But Virginia had a sense I would be a good successor to her, and I’m eternally grateful to her for that.”

In early 1992, Marquet came to Santa Rosa for a series of interviews with board leaders and members. “I felt I had something to offer, and the dedication of the board was obvious. They felt passionately about making the Foundation succeed, and I wanted to go somewhere where they were ready to take their Foundation to \$100 million.”

Her credentials were impressive. She was the first executive director of the Greater Worcester Community Foundation in Massachusetts from 1979 to 1992, and had grown that foundation’s assets from \$1.5 million to more than \$30 million. She was also a consultant to the Council on Foundations, then in Washington, D.C., using her expertise to assist growing community foundations nationwide.

After much discussion, the board eventually chose Marquet despite some worries that because she had spent her life on the East Coast, she might not be happy in California.

“Louise Levinger felt so strongly that someone from New England might not fit in ‘laid-back’ Sonoma County, but I thought Kay was perfect. She had run a medium-sized community foundation in Worcester, and she really wanted to see us succeed,” Shanahan said.

For her part, Marquet quickly fell in love with Sonoma County. “Within two months I knew this was where I belonged. I felt so welcomed by the community. So many people came out to a welcome reception for me. They were warm and indicated their readiness to get to work. It totally blew me away,” she said.

“With the help of the staff, I set out to meet all the board members and former board members, one on one. They introduced me to people in leadership positions and other key people in the community. I met with them as well,” Marquet said.



“I’m a huge believer in mini-grants. A small amount of money given thoughtfully to an organization, that will be key to their work, is very meaningful. It also enables the Community Foundation to illustrate what we are about. The board members of those nonprofits are also potential donors to the Community Foundation, so you get their attention. This kind of giving enhances the whole story.”

Kay Marquet
Executive Director
1992–2009

The job, however, was daunting. “It was a big, big challenge,” she said. “I had left all the partnerships and alliances I had known in Worcester. We didn’t have any printed materials that were current, and we quickly needed to put together a brochure and raise \$100,000 in six months if we were to keep our National Endowment for the Arts grant.

“The Foundation’s assets were at \$4.1 million. I knew that at that level a community foundation is still struggling to get its message out. Five million dollars was then considered a takeoff point. It doesn’t mean you are self-sufficient, but people are beginning to understand what you do, and you begin to get articles in the press,” Marquet said.

Her breadth of experience and ability to think outside the box showed its value later that year, when Nancy Dobbs, president and CEO of local television station KRCB, Channel 22, approached the Community Foundation with an urgent request for help.

The station had obtained its FCC licensing to launch a public service radio station—the first local English-language public radio station in Sonoma County—but didn’t have the money to install it. “We were up against the wall financially. Nobody would lend us any money, and we were just hanging on,” Dobbs said.



As it happened, Schulz had established a Designated Fund—an endowment exclusively for KRCB—in 1988. The return from the endowment provided the station with a small stream of income. However, KRCB was already using that money—several thousand dollars a year—to upgrade the TV station to digital quality.

“Then Kay had a brilliant idea,” Dobbs said. “She proposed a program-related investment. The Foundation would lend us \$50,000 out of the Designated Fund to start the radio station.

“It was a way of making the money do double duty,” she said. “We got the money we needed to put the station on the air, and we made the KRCB Endowment Fund whole again when we repaid the loan.”

The station’s huge 24-foot diameter satellite dish was used as collateral, and Marquet chuckles when she thinks back on it. “I kept worrying that if they defaulted on the loan, a truck would show up at our office with a huge satellite dish on the back. We had no idea what we’d do with it.”

The KRCB loan was the Foundation’s first program-related investment. Another program-related investment came after the California Human Development Corporation asked Jean and Charles Schulz for a donation from their private foundation. Instead, Jean Schulz donated money to the Community Foundation, which then loaned it to the CHDC. As the money came back, it went into a revolving loan fund for the future use of other nonprofits. “I was the guinea pig in a lot of areas,” Schulz said.

Over the next year or two, the board drew heavily from Marquet’s experience to further professionalize the board, develop policies and procedures, and make investment changes. The work was not as showy or as well known as the Foundation’s projects, but the cumulative impact made the Foundation much more effective in reaching donors and in awarding grants.



“I think that’s one of the most impressive parts of our history,” said Barrie Graham, a board member in the early 1980s and again in the late 1990s. “We’d had our money in very conservative investments. Kay urged the board to adopt a more sophisticated investment policy and to develop guidelines for distributing large multiyear grants.

“I remember thinking at the time that it was interesting, but premature. We didn’t need advanced policies and procedures,” Graham said. “But when the DeMeo gift came [in 1995], we were much more advanced than other foundations our size, and we were prepared. We were able to invest the money in a diversified portfolio and provide the governance and oversight that a much larger foundation required.

“That is what is called vision,” Graham said. “You see the organization as it could be and don’t let the current state stifle your planning and preparation. We had positioned the Foundation for future success, and we were both grateful and fully prepared when it happened.”

The changes included:

Creating an Investment Advisory Committee. During its first 10 years, the Foundation had invested the endowment money in the safest of possible ways, in Certificates of Deposit and Treasury funds, but the returns were small. Under Marquet’s guidance, the board created an Investment Advisory Committee that could balance risk and return and recommend higher yielding investment. Some of the brightest financial minds in Sonoma County volunteered for the committee, which met quarterly.

“I knew the previous investment policy wasn’t adequate for \$4 million in assets. It wasn’t adequate for growth and it wasn’t adequate for me to sell the endowment concept to donors,” Marquet said. “The money needed to be prudently invested, using the best judgment we could.”

Hiring estate planning attorneys to advise donors. The board wanted donors to have the best possible advice on tax issues and complicated estates, so it hired estate planning attorneys who could keep up with ever-changing IRS regulations and respond to the unique needs of each individual donor.

“Bob Hobson and Phil Murphy brought years of expertise,” said Schulz. “They understood the different planning vehicles and which one would best benefit a particular donor. We implemented charitable lead trusts, charitable remainder trusts, insurance trusts and pooled income funds in order to give donors as many choices as possible.”

Seeking diversity in board members. The board pledged itself to a membership that was diverse geographically, and in interests, gender and ethnicity. “We were always soliciting potential candidates’ names from board members, trying to balance the board’s skills and make sure we had representatives from different parts of the county,” Schulz said.

As a result, as the Foundation grew and evolved, and as different skills were needed, directors were already in place to fill those needs. “It was a very serious group from the beginning, and what gave it stability was the diversification,” said Pat Kilkenny, principal of Kilkenny Advisors and vice president of the board.

Setting new parameters for funding. Previously the board used the interest from the endowment to fund grants, but interest rates fluctuate from year to year, creating uncertainty for both donors and potential recipients. The board smoothed out the ups and downs by implementing a total return investment policy, in which the amount of each year's grants equaled 4 percent of the market value of each fund averaged over 12 prior quarters. The percentages would be reviewed each year and changed as necessary.

Establishing a grant application process. The board also established a formal, competitive grant application process, informing applicants of available funds and the Foundation's funding priorities. For the first time, those who received grants were required to submit six-month and 12-month progress reports. A site visit process evolved so that the board, staff and volunteers could make more informed decisions about organizations seeking funding.

Rewriting the bylaws. The bylaws were brought into conformance with national standards and, shortly afterward, board member terms of two to three years were established. "We felt that people being recruited for the board should know what was being asked of them. Later, the bylaws were tweaked to adopt emeritus positions and to allow board members to have an additional term as circumstances might dictate," Schulz said.

Maintaining independence from political or financial interests. The board established, as a guiding principle, that it would maintain its organizational independence from donors or other organizations. "The Foundation has been diligent in not linking itself politically or financially with anything or anyone that would restrict its independence," Kilkenny said.



Photo: Community Foundation

Issuing annual reports. The Foundation began publishing annual reports on its projects, goals and accomplishments. In 1994 and 1995, the reports were awarded the Wilmer Shields Rich Award for Excellence in Communications by the Council on Foundations.

This time-consuming revamp of policies and procedures did not go unnoticed. In 2002, Community Foundation Sonoma County became one of the first community foundations in the nation to meet the comprehensive standards established by the Council on Foundations' National Standards Board.

"I felt really good about this," said Schulz. "We were a relatively young organization, yet we were able to meet the Council's high standards and receive their seal of approval designating us as a sound investment for philanthropists."

Throughout this period, the Foundation continued and expanded the mini-grant program begun by Schulz and Hubbell. Awards went to hundreds of community organizations, including \$1,000 to Sonoma County Legal Services for a conflict resolution program; \$1,500 to the Healdsburg Community Band for the purchase of drums; \$5,000 to the Occidental Area Health Center for a centralized billing system; and \$1,000 to Sonoma County Wildlife Rescue to expand its environmental education program.

"I'm a huge believer in mini-grants," Marquet said. "A small amount of money given thoughtfully to an organization, that will be key to their work, is very meaningful. It also enables the Community Foundation to illustrate what we are about. The board members of

those nonprofits are also potential donors to the Community Foundation, so you get their attention. The goodwill and community exposure gained by this kind of giving far outweighs the cost of the grants.”

As it had in past years, the board continued to seek advice from others. Among other things, board members traveled to seminars conducted by statewide foundations such as the Hewlett Foundation, the Irvine Foundation and the Packard Foundation.

“I learned some of the most important concepts of foundation work at these seminars,” said Schulz. “They talked about being willing to risk some of your resources for a new idea or an organization with a good track record. They emphasized that community foundations had the virtue of being nimble and flexible. I remember—and have repeated often—a remark attributed to one of the Rockefellers, ‘If all your grants are successful, you aren’t reaching broadly enough!’”

At about this time, the Foundation was selected, based on its potential and the quality of its board, to participate in a comprehensive onsite consulting program offered by the national Council on Foundations. This brought the Foundation the help and counsel of Steve Mittenthal, head of the successful Arizona Community Foundation.

Other advisers included Bill Somerville, CEO of the Peninsula Community Foundation; Alan Pardini from the League of California Community Foundations; and Sterling Speirn, who succeeded Somerville as CEO at the Peninsula Foundation and who is now CEO of The Kellogg Foundation.

In 1993, the board invited the community and donors to celebrate the Foundation’s 10th anniversary. The Foundation reached \$5 million in assets, and board members heaved a collective sigh of relief.

“Until you get to \$5 million, you have no credibility because people who have money are very concerned about how their money will be handled and they don’t know you from Adam. You don’t have a track record to offer them,” Art Lafranchi said. “Once you reach \$5 million, you have credibility.”

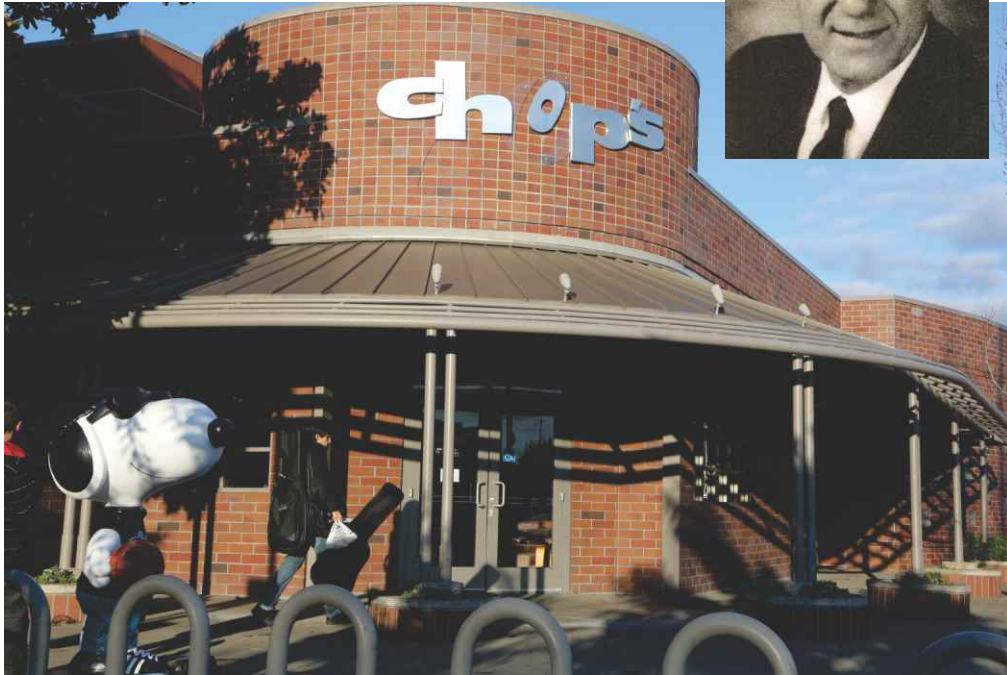
The Foundation had raised nearly another \$1 million by 1995, when everything changed.



“I learned some of the most important concepts of foundation work at these seminars. They talked about being willing to risk some of your resources for a new idea or an organization with a good track record. They emphasized that community foundations had the virtue of being nimble and flexible. I remember—and have repeated often—a remark attributed to one of the Rockefellers, ‘If all your grants are successful, you aren’t reaching broadly enough!’”

Jean Schulz
Board of Directors

Photo: Jill Catherine Newman



With his gift of \$16 million to the Community Foundation, Charles "Chop" DeMeo made Chop's Teen Club possible.

4 *The Largest Bequest in Sonoma County History*

(1995)

The electrifying announcement came as Pat Kilkenny, then vice president of the board, was attending the Community Foundation’s annual meeting at Finley Center.

Charles “Chop” DeMeo, a Santa Rosa attorney and banker, had died and left stocks and other investments valued at “more than \$10 million” to the Community Foundation. The bequest, later assessed at \$16 million, was—and still is—the largest charitable bequest in Sonoma County history.

It was a stunning and sobering moment, said Kilkenny, principal of Kilkenny Advisors. He had heard about the bequest a few days earlier, but the announcement brought it home. “All of a sudden it became real. My first thought was, ‘That’s a lot of money.’ My second thought was, ‘That’s a lot of responsibility.’”

The bequest would transform the Foundation.

DeMeo’s gift more than tripled its assets, bringing them from about \$6 million to more than \$23 million. It committed the Foundation to two long-term projects, and as an endowment, greatly expanded the amount of money that could be awarded annually. After struggling for visibility for more than a decade, the Foundation was suddenly front-page news.

“It put us on the map,” Kilkenny said. “The fact that one individual would donate \$16 million to us gave us credibility. We went from adolescence to adulthood.”

Benefactor Charles DeMeo was born in 1904 and grew up in a working-class family in Santa Rosa’s Little Italy. He and his brother Nick worked from the time they were children, helping to support the family by picking fruit and digging graves. Charles DeMeo put himself through college, then law school, and opened a law practice. He later became Santa Rosa’s first Italian-American mayor and a founder of Summit Savings Bank.

Brad DeMeo, an attorney and Charles DeMeo’s great-nephew, was the only family member who had known the bequest was coming, but his great-uncle had sworn him to secrecy. “Community service is a big deal to me, so I was very excited about the bequest. It was difficult for me not to talk to people about it. But he was very, very clear. He told me, ‘Don’t tell anybody about it,’” Brad DeMeo said.

The elder DeMeo had approached Brad DeMeo in the late 1980s about setting up a family foundation, but Brad DeMeo had referred him to Kingsley Brown, a San Francisco attorney specializing in trusts and estates. Working with Brown, Charles DeMeo decided to use the Community Foundation instead of setting up a private family foundation.



Thanks to Charles “Chop” DeMeo’s legacy, Chop’s Teen Club — a multipurpose recreational facility with a tech lounge, gym, climbing wall, art studio, nightclub, café, teaching kitchen and recording studio — was built. With memberships starting at \$1 a year, the club currently has 1,200 teen members and counts more than 20,000 visits annually.

Photo: Charles & Helene DeMeo, London, 1956

“There are a lot of tax issues and compliance requirements with private foundations, and he felt it was too much trouble to set one up. A family member would have to be willing and capable of administering a family foundation, and we were all busy. He felt it would be a burden for one of us to manage it,” Brad DeMeo said.

In his bequest, Charles DeMeo had set aside half his money for a permanent endowment that could generate income annually for years to come. The other half could be used immediately. All the money would go to benefit the two causes he held most dear: the well-being of the young people of Santa Rosa and of homeless women with young children. Brad DeMeo and Bill Pass, Charles DeMeo’s friend and financial adviser, were to assist and advise the Foundation toward that end.

The Foundation created the DeMeo Advisory Board to help determine the best uses of the bequest. Members included Jeannette Anglin, a school principal and administrator; Jeanne Martin Buckley, a juvenile court judge and chair of the Advisory Board; Brad DeMeo; Bill Pass; and Cathleen W. Vicini, a marriage and family counselor.

“It’s easy to give. It’s easy to receive. But it was difficult to meet all of Mr. DeMeo’s wishes and desires,” Kilkenny said. “He was very, very conscious of what he wanted to take care of.”

The Advisory Board asked the public to submit letters with recommendations, and received more than 125 responses. Nonprofit organizations serving youth were consulted. Three community forums were held, one on homelessness and two on youth. One of the youth forums was for parents and organizations serving youth; the other forum was for young people only. Subsequently, an advisory committee of young people was formed. “We really wanted to hear the voice of youth,” Marquet said.



Lena's is now part of Chop's Teen Club.
Photo: Jill Catherine Newman

Out of the mix came a decision to create a youth club at the former Lena’s Restaurant in Railroad Square, Charles DeMeo’s old neighborhood. The 107-year-old restaurant, once the most popular nightspot in Santa Rosa, would need extensive remodeling, but its location was ideal for a teen club—close to public transportation and within walking distance of downtown.

The result, more than 18 years later, is Chop’s Teen Club—named for Charles “Chop” DeMeo—a multipurpose recreational facility with a tech lounge, gym, climbing wall, art studio, nightclub, café, teaching kitchen and recording studio. With memberships starting at \$1 a year, the club currently has 1,200 teen members and counts more than 20,000 visits annually.

True to Charles DeMeo’s wishes, Chop’s is more than a place to play basketball or hang out with friends. The club reaches out to troubled Santa Rosa teens with mentoring, career guidance, workforce development and youth empowerment programs. “We care about teens, we empower them, and we’re creating a stronger community,” said Diana Curtin, Chop’s executive director.

Yet it took six long years for the youth club to win neighborhood acceptance and for the Foundation to gain city approval.

“The neighbors really did not want us. They didn’t want to see the demise of Lena’s, even though it had been closed for two years,” Marquet said. “It was difficult working through the city process to address all the concerns. For example, the neighbors insisted on a huge amount of parking, which isn’t utilized because most of the teens don’t have cars. We had to go through the entire planning process twice, including the design review board, historic preservation board and the planning commission. It was grueling.”

The DeMeo family also found itself a target of neighborhood resentment and the focus of hostility at public meetings.

“There was tremendous negative reaction to refurbishing Lena’s,” Brad DeMeo said. “Lena’s was a jewel that was cherished by a lot of Santa Rosans. At public hearings before the city council, people would say that my family was trying to overwhelm the community with its own vision of how things should be.

“It was bizarre to me that someone could try to do something good for the community and be perceived as a bad guy by large portions of the community for reasons I couldn’t understand,” he said.

The problems didn’t end even after the city finally gave its approval. The Foundation had intended to renovate Lena’s, but architects said it was structurally unsound and would have to be demolished. A new building went up, and, in the end, all the Foundation could save was the restaurant’s north wall and a magnolia tree more than 100 years old. Chop’s finally opened its doors in October 2001.

“I took a lot of walks during that period,” Marquet said. “I’d look up at the skies and say to Chop, ‘I hope you like this, but why did you pick me to worry the rest of my life about Chop’s Teen Club and the teens of Santa Rosa?’”

In spite of the turmoil, the public and the financial community began to recognize the value of the Community Foundation’s endowment program and its ability to work with community groups. Tom Tolliver, the club’s first director, played an important role in working with the neighbors, the city, teens and professionals.

“The teen club created huge excitement for the Community Foundation. It was being recognized for leadership in the community. This broadened the cadre of consultants who would encourage their clients to use the Foundation for their own philanthropy,” said Irv Rothenberg, then treasurer of the board.

During this time, the Foundation also worked to fulfill Charles DeMeo’s wishes to help homeless women with children. His bequest specified an outcome, not a particular program or project: women who would be able to “better provide for themselves and their families and to become more meaningful participants in society.”

The Foundation convened nonprofits working with homeless issues just as it had brought together nonprofits dealing with youth.



Charles & Helene DeMeo's residence now houses homeless single mothers and their children.
Photo: Jill Catherine Newman

“The ability to bring together these community organizations was extraordinary,” Rothenberg said. “I’m not sure anybody but the Foundation could have done it. Only the Foundation had the flexibility, the funding and the leadership to pull together the organizations and hold the meetings that could build consensus.”

Ultimately, the Foundation took ownership of DeMeo’s residence from his estate in order to create a transitional shelter for two mothers at a time and their children. The 60-year-old house needed extensive renovation, but it had an enclosed backyard, was near Santa Rosa Junior College and on a bus line.

Volunteers provided \$100,000 in labor and supplies to create two apartment-like sections with a common kitchen, sitting room and backyard. After a limited request for proposals, the DeMeo house was deeded to Catholic Charities, which now operates the home. The DeMeo Fund pays an annual amount toward operating expenses.

The DeMeo bequest also provides grants and scholarships to organizations to benefit homeless mothers, and scholarships to formerly homeless mothers who want to further their education.

One scholarship recipient was living in a women’s recovery center with her two children when she first applied for a DeMeo scholarship. In 2005, she graduated from Sonoma State University with a degree in psychology and plans to obtain a master’s degree.

“I think Charles DeMeo would be pleased. I believe, to the best of our ability, we are doing exactly what he wanted,” Marquet said. “Santa Rosa teens have a place to go, and there is a place for moms with young children to help avoid homelessness.”



Photos: Jill Catherine Newman

In 1999, the Community Foundation formed the "Shelter Solutions" task force, which resulted in the establishment of Samuel L. Jones Hall.

5 *The Foundation Comes of Age*

(1996 to 2003)

The DeMeo bequest challenged the Foundation and the board in ways that would have been inconceivable a year before.

“The DeMeo bequest gave us great momentum—it gave the organization a lot of public validation,” said John O’Brien, who had been president in 1994. “People could really see what we do. Those with wealth were seeing what could be done. It’s not like writing a check for an organization and it’s gone. An endowment goes on forever.”

A series of newspaper stories about the bequest kept the Foundation in the public eye. Donations swelled, helped along by a prosperous economy, now in its sixth year of economic expansion after the 1991 recession.

“Look at the grants, the statistics. It’s amazing,” O’Brien said. “In 1994, we made grants totaling \$923,000. Three years later, they totaled \$2.6 million. With the DeMeo money, the Foundation had assets of \$23 million. Two years later, we were up to almost \$49 million.”

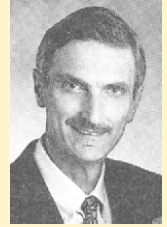
Relationships with potential donors, nurtured for years, had begun to pay off.

“The business of the Foundation is relationships,” explained Jean Schulz. “Many relationships take years to build and years to come to fruition. There were many seeds planted by Kay Marquet back in the 1990s that are being realized and completed now and into the future.”

Major donors came into the Community Foundation fold, with names reading like a Who’s Who of Sonoma County: Herb Dwight, president of OCLI, who later became a board member, and his wife, Jane; Henry Wendt, founder and chairman of Global Health Care Partners; Hazel and Roland Todd, who donated two pieces of prime property to the Foundation that were later sold for about \$3 million; Barbara Banke, co-proprietor of Kendall-Jackson Winery; Peggy and Fred Furth, owners of Chalk Hill Estate Vineyards & Winery; and Demaris Brinton, a forward-thinking board member who launched the Foundation’s Healdsburg affiliate.

There was also more interest in the board itself. “When we first started, it was difficult to attract people to the board. After DeMeo, it became much easier,” Pat Kilkenny said. Barbara Banke, Herb Dwight and Henry Wendt, for instance, served as board members before they became donors.

Staff numbers grew. In 1997, Marquet hired the Foundation’s first chief financial officer, Paul DeMarco, who joined five other staff members in assisting the board and the volunteer committees that advised the board.



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John O’Brien
Board President, 1994

In many ways, the Foundation was perfectly poised to manage the enormous DeMeo bequest: Investment policies had been upgraded a few years earlier, and top financial talent already existed on the board and on the Investment Advisory Committee.

On the other hand, the actual experience of the Foundation's board had been with much smaller sums. Board members sought advice from experts in the field and drew heavily on Marquet's experience managing the \$30 million Worcester community foundation.

"The capacity of the Foundation to manage this size of a bequest was a big issue when I came on the board," Brad DeMeo said. "The Irvine Foundation recognized what was happening, and gave us a capacity-building grant so we could get the training and education to handle a gift that size. There were a lot of sophisticated people on the board, but we all agreed we needed the proper training."

The board continued to educate itself in other ways as well. A commitment to annual retreats, begun in Virginia Hubbell's time, continued. The board brought in local and national speakers, held annual retreats, and attended national conferences. The practice of more experienced board members becoming mentors for new board members began.

In 1998, the Foundation decided to close its offices in Fountaingrove and move to downtown Santa Rosa, giving up the complimentary use of the Pisenti & Brinker conference room provided by Ed Pisenti, a Foundation board member and a principal in the firm. "From national research and studies, we knew that a community foundation did better if it was located in the heart of the community it served," Marquet said.

That September, the Foundation moved into the Barnes & Noble building on D Street—the historic Rosenberg's Department Store building. "It was a signal that we were in the community, and that we had reached a certain level of grantmaking," Marquet said.

Three years later, in 2001, the Foundation changed its name to Community Foundation Sonoma County to emphasize that it put community first and also to make it clear that it was not part of county government.

"We felt that Sonoma County Community Foundation sounded like a government agency; and when you tried to find us in the phone book or any reference, we were mixed in with Sonoma County government listings," said board member Barrie Graham.

Earlier, the Foundation had used the DeMeo bequest to provide shelter for homeless women with children. In the late 1990s, Board President Rhoann Ponseti thought the Foundation could do more. Santa Rosa had only 200 shelter beds to serve nearly 1,000 homeless people. Worse yet, the National Guard had announced its intention to close the two armories that were used as the shelters during winter.

"Homelessness is a hot topic that nobody really wants to touch," said Ponseti, a marketing consultant.



In 1999, following in the tradition of board member activism, Ponseti sat down with the Foundation’s program officer to see what could be done to improve the lot of the homeless in Sonoma County.

Thus was born “Shelter Solutions,” a task force that included County Supervisor Mike Reilly and later Supervisor Mike Kerns, Santa Rosa City Councilmember Janet Condrón, and Georgia Berland, a founder and executive officer of the Task Force for the Homeless.

Condrón picked the name “Shelter Solutions” to indicate the group’s goals. “We didn’t want just a shelter. We wanted a place where lives could be changed,” Ponseti said.

Five years of hope and hard work followed. Each potential location was fiercely opposed by nearby residents, who spoke out at neighborhood meetings, planning meetings and city council meetings about their fears for the safety of their children and their concerns about loitering, sanitation and crime. At one point, the Foundation even approached the National Guard—then in the process of vacating the Armory building—but was rejected.

Eventually, a location was found on the former Naval Air Reserve Station on Finley Avenue, once the home of the Second Battalion of the Army Reserve. The \$1.7 million cost of revamping the building was borne by the city of Santa Rosa with the help of federal grants, the Community Foundation and the county of Sonoma, with contributions from North Bay Corporation, Santa Rosa’s waste hauler.



Photo: Jill Catherine Newman

Because of its Army Reserve history, the shelter was named in honor of a courageous Santa Rosa soldier. Samuel L. Jones, a Santa Rosa attorney and deputy district attorney, received the Bronze Star for courage under fire in World War II, and was recalled to military duty during the Korean War. He was killed in action in 1951, and awarded the Silver Star posthumously.

Catholic Charities was selected to operate the shelter and, shortly before the shelter opened, an anonymous benefactor donated \$2 million to the Community Foundation, establishing Betty’s Fund, an endowment to pay for homeless services at the shelter.

In November 2005, the Samuel L. Jones Hall opened its doors with 80 beds, later expanded to 120 beds (more in inclement weather). It is the largest adult homeless shelter in Northern California, and provides dinners, showers and cots for the night as well as counseling services, medical referrals, job counseling and placement to help people rebuild life skills. The income from Betty’s Fund was earmarked for financial planning classes and drug rehabilitation programs that could help the homeless move into temporary housing.

“It is probably the thing I am proudest of in my years of serving as an elected official,” Condrón said. “We started out with ‘where do we go,’ and then narrowed down to potential sites. The one that rose to the top was Samuel Jones Hall.

“Shelter Solutions was successful where other attempts had failed because of its determination to bring all sides to the table, said Condrón. “That was what was so unique and powerful,” she said.

“Prior to that time, there was a lot of finger-pointing between the city and county,” Condrón said. “For Santa Rosa, the homeless were in its downtown and it had to deal with that issue. However, the county was getting funding for social services, so city officials felt homelessness was their issue,” Condrón said. “Shelter Solutions reached a basic agreement that we would meet only if representatives of both the city and county were there. We knew the only way anything was going to happen was if it was a combined effort.”

Condrón spoke at the dedication of Samuel L. Jones Hall, and praised Ponseti’s tireless work and determination. Ponseti was the driving force behind Shelter Solutions, Condrón said, and without her efforts the shelter would never have opened.

“It was probably the best moment of my life,” Ponseti said.



Shelter Solutions also helped to site two other homeless shelters: the 40-bed Brookwood Avenue shelter, which opened in 2002 for families and single people, and the 30-bed Russell Avenue shelter, which opened in 2003 as emergency shelter for families. In 2011, the uses of the two facilities changed. The Brookwood Avenue shelter became the Brookwood Health Center, providing primary medical care and mental health services to the homeless and uninsured, and the Russell Avenue shelter became transitional housing for homeless families.

The Brookwood Avenue Homeless Shelter has now become the Brookwood Health Center.
Photo: Jill Catherine Newman

“This is exactly the kind of thing a community foundation can do well,” Schulz said. “It’s the kind of benefit we wanted to bring to the community when we launched the Foundation, even if we didn’t know exactly what we would be doing.”

Community benefit was the Foundation’s highest priority, and it attracted philanthropically minded individuals with the same goal. Its diverse programs and funds allowed those individuals to choose the way they wanted to give.

Charles DeMeo, for instance, had enjoyed keeping his generous bequest a secret, to be revealed only after his death. Sonoma Valley residents Hazel and Roland Todd had a different strategy: planned giving that began during their lifetimes.

The Todds were the quintessential Foundation donors: people of significant wealth who either had no heirs or had provided for them, and who wanted to match their giving to their interests. They were introduced to the Foundation by their attorney, Tom Haeuser of Sonoma.

In 2000, the Todds followed up on an earlier meeting with Marquet and established an endowment to benefit the Sonoma Valley they loved. One of their first acts was to start a Donor Advised Fund, funded by a gift of property to the Foundation. The property sold quickly, and the Todds used the proceeds to make a series of grants in their areas of interest.

Roland Todd believed that the fire departments, which were the first responders to medical and other emergencies in Sonoma Valley, were woefully underfunded. Marquet met with fire department leadership to assess their needs. The outcome was a grant of \$300,000 to each of the three Sonoma Valley fire departments—Kenwood, Schell Vista and Glen Ellen.

The \$300,000 gift to the Glen Ellen fire department, combined with \$175,000 raised by its Firefighters Association, led to the purchase of three much needed fire vehicles. One of the vehicles, a fire engine, was named “Hazel T” and the Todds were invited along on its first ride.

Marquet would meet with the Todds many times in the coming years, working with them to find ways to fund the projects closest to their hearts. One example was a significant donation to F.I.S.H. (Friends In Sonoma Helping), a nonprofit that provides immediate emergency assistance to families on the brink of homelessness or going hungry.

“It was such a delight to work with this couple. Hazel Todd was a truly lovely person, and we became good friends,” Marquet said.

The Foundation ended 2003 with \$88.3 million in assets, compared to \$5 million a decade earlier. In 1993, the Foundation had been a little-known charitable organization. Now it was on its way to becoming a major player in the community.



The Todds' fire engine gift.
Photo: Community Foundation

Photo: Tom Giesco



The Community Foundation helped to protect the Pepperwood Preserve's 3,200 acres in the Mayacamas range.



Photo: Sarah Franke

6 One Hundred Million Dollars

(2004 to 2008)

The Foundation's successes in bringing community groups together for major projects, such as Samuel L. Jones Hall and Chop's Teen Club, had raised its visibility and its stature in the community at large. Other donors who were interested in long-term projects began approaching the Foundation to see what could be done.

In 2005, longtime donor Herb Dwight and his wife, Jane, purchased the Pepperwood Preserve, 3,200 acres of wild beauty and rich biodiversity high in the Mayacamas range. They then approached the Community Foundation looking for ways to protect the land.

It worked. The Dwights created the Pepperwood Foundation, incorporating it as a supporting organization to the Community Foundation and the California Academy of Sciences, the Preserve's former owner. They then placed a forever-wild designation on the property. The Pepperwood Foundation now manages the land with a goal of promoting natural history education, research and preservation.

Herb Dwight is pleased with the result. "We educate people of all ages and conduct research aimed at learning how to become better stewards of the land," he said. "We serve as a convener of a wide variety of environmental organizations seeking to improve conservation and preserve what little natural land continues to exist on this globe."

The Preserve hosts field trips for about 1,500 Sonoma County youngsters each year, and partners with Santa Rosa Junior College to provide field trips and scientific lectures for adults. One of its ongoing research projects is the North Bay Climate Adaptation Initiative. The project, with funding from the Community Foundation, is analyzing the potential impact of climate change on Northern California plants and animals.

The Pepperwood Foundation was one of a number of affiliates and supporting organizations created during this period. "It was a remarkable time, a time when the efforts of many years really came to fruition," Kay Marquet said.

Other affiliates and supporting organizations included:

- The Healdsburg Area Affiliate. In 2003, board member Demaris Brinton convinced her fellow board members to create a community-based affiliate to raise money and manage grant programs for the benefit of Healdsburg-area residents. Working under the umbrella of the Community Foundation, the Healdsburg Area affiliate has its own board and works with local donors to serve the needs of local nonprofit organizations.
- The Sonoma Paradiso Foundation. The foundation, which focuses on helping children in need, became a supporting organization to the Community Foundation in 2004.

The Pepperwood Preserve hosts field trips for about 1,500 Sonoma County youngsters each year, and partners with Santa Rosa Junior College to provide field trips and scientific lectures for adults. One of its ongoing research projects is the North Bay Climate Adaptation Initiative. The project, with funding from the Community Foundation, is analyzing the potential impact of climate change on Northern California plants and animals.

- The Sonoma Valley Fund. A community-based affiliate created in 2006 and organized along the same lines as the Healdsburg Area affiliate. It serves the Sonoma Valley and Boyes Hot Springs area, and works with a board of Sonoma Valley residents to support local nonprofits.

Also during this time, the Community Foundation received the first of two major grants from the James Irvine Foundation, a total of \$900,000, to advance the arts in Sonoma County.

Working in partnership with the Arts Council of Sonoma County, the Foundation created countywide arts festivals, a lecture series to help artists manage the business side of their careers and an annual juried artists' awards program. The funding also facilitated the creation of the Arts District on A Street in Santa Rosa, and brought the visual and performing arts groups together in a way that had never happened before.



M.F.K. Fisher's portrait
© Ginny Stanford

It was another instance where small grants, well-placed, made a significant difference, Marquet said.

She gave the example of portrait painter Ginny Stanford who, early in the Foundation's history, received a small Foundation grant that allowed her to continue her art by moving to a professional studio and out of an unsafe live-work space. Her talent flourished, and in 2007, she was commissioned to do the portrait of Hillary Rodham Clinton that now hangs in the Smithsonian National Portrait Gallery.

In 2003 and 2004, the Foundation reached out to help Latino children with diabetes by making a \$25,000 grant to the Alliance Medical Center of Healdsburg.

Then, as now, the number of young Latinos with Type 1 diabetes was growing at an alarming rate, outpacing all other ethnic groups. Unhealthy eating habits are one of the root issues in diabetes, and the grant provided funding for information and counseling to Latino families about healthy, nutritious eating.

The program, which culminated in 2004, was the first of its kind, and was recognized nationally in the prestigious *Chronicle of Philanthropy*.

"We're breaking new ground, and some of what we are doing may never have been done before," said Max Dunn, then the Alliance's executive director. "We are bringing entire families together in a kitchen and educating through demonstration and participation, proper diet, nutrition and how to actually cook healthy meals. At the end of each session, the entire family shares and enjoys the food together."

Marquet said the program was one of those that made her most proud of the Foundation's work.

"Today you hear so much about this issue, but it was new to all of us when the grant was made," she said. "I am even more proud today, knowing that we were ahead of the curve and that we supported this effort to really help families and to prevent the problem for their young people."

An important milestone came in 2005, when the Foundation surpassed \$100 million in assets. According to national figures, the average community foundation needs 31 years to reach \$100 million in assets, but Community Foundation Sonoma County had done it in 22 years.

“It was pretty exciting,” said Albert Handelman, the board chair in 2006. “Once you cross \$100 million, you’re in a different league as far as community foundations go. You’ve gone from being a small foundation to a medium-sized foundation. It’s a big deal, and it’s a lot of money.”

Also in 2005, Bay Area arts patrons Steve and Nancy Oliver opened discussions with the Foundation that eventually led to the permanent protection of their 100-acre Alexander Valley ranch and its unique site-specific sculptures.

The board continued to refine its services for donors, and formed a development committee to focus specifically on reaching out to donors and connecting them with the nonprofits whose goals matched their own. “We knew that a Foundation must be there to help, and to be a guide for both donors and the nonprofits,” Jean Schulz said.

But in late 2007, the nation’s economy slipped into the worst recession since the Great Depression. Donations slowed, and community needs increased.

“The downturn had a significant impact on the Foundation’s investment earnings and on donations,” said Barbara Graves, then the board chair.

To cut expenses, the Foundation reduced staff salaries and, in 2009, scaled back the annual report as well. “The staff was understanding and practical, realizing the times called for shared sacrifice,” Marquet said.

Investment returns and donor contributions decreased, but grant dollars declined more slowly. The Foundation’s practice of basing payouts on the previous three years’ earnings helped smooth out the impact.

“With its experience and its partners in the community, the Foundation continued to make a positive difference for residents,” Marquet said.

Between 2007 and 2010, the Foundation, among other things:

- Supported a voter education and registration project of the Coalition for Latino Civic Engagement. Latino voter registration rose 13 percent after young volunteers canvassed five precincts in Roseland, surveying residents and encouraging them to participate in the political process.
- Assisted Roseland’s struggling Cinco de Mayo parade by setting up a fund that allowed donors to get a tax deduction for their parade contributions. “Donors wouldn’t give without that. I thought that if we could do a Rose Parade for the Santa Rosa community we could do a Cinco de Mayo celebration that was safe and fun for our Latino residents,” Marquet said.



- Provided a small grant to educate voters about a 2006 ballot measure renewing the Open Space and Agricultural Preservation District. The measure ultimately passed and preserved a ¼-cent sales tax for the purchase and preservation of undeveloped land and farms in Sonoma County. To date, the District has preserved about 80,000 acres of agricultural, scenic and recreational land as a legacy for future generations.

“The Foundation gave vital support to our campaign at a critical time,” said Ted Eliot, who co-chaired the 2006 campaign. “As a result, this District, whose work is almost unique in the United States, will continue for another 20 years.”

- Helped create the 211 emergency help line in partnership with the county of Sonoma, the Volunteer Center of Sonoma County, United Way of the Wine Country and First5 California, an organization that advocates for and invests in services for preschool children.

The 211 service, part of a nationwide program, is free and confidential. It connects people in need with agencies that can help them on issues such as health care, employment, housing, food, elder care, and mental health or drug or alcohol treatment. In 2010 alone, nearly 91,000 people in Sonoma and Mendocino counties called 211 and were put in touch with more than 500 local agencies.

“This is a significant new resource for the community,” said Eunice Valentine, the Volunteer Center’s executive director. “The Community Foundation was instrumental in being part of the steering committee that launched it and in providing some of the seed money.”

In spite of all the activity, Marquet still found time to visit regularly with her old friends, Roland and Hazel Todd. The Todds, already generous benefactors to Sonoma Valley, intended to leave a large bequest to continue their giving after their death, Marquet said.

“I like to create situations where everyone can win,” Marquet said. “The Todds’ generosity would benefit people in the Sonoma Valley they loved so much, the Community Foundation would receive a major donation, and the Todds’ bequest would go on forever, with an annual payout from their permanent endowment.”

The Community Foundation celebrated its 25th anniversary in 2008 with a gala event at the Friedman Center, attended by more than 150 people. A comprehensive annual report was published, looking back over the Foundation’s first 25 years.

The festivities also marked a milestone—\$100 million in grants and scholarships to community organizations. It was the fulfillment of a dream for those who had launched the Foundation a quarter century before.

But as the decade drew to a close, so did Marquet’s tenure. In 2009, she stepped down from the Foundation she had nurtured, led and coaxed into greatness. During her 17 years as president and CEO, the Foundation had grown from a small, little-known charity into one of the region’s premier foundations.

“Kay handed over an organization that had a great reputation in the community and an enormous growth in assets over the years. She was hugely successful in terms of growing the endowment. The Foundation now had a real track record of partnership and accomplishment,” said Handelman, then board secretary.



Photo: Jill Catherine Newman

Community Foundation efforts provided two million pounds of fresh produce for distribution by the Redwood Empire Food Bank's 3,000 volunteers and its affiliates.

As fallout from the recession lingered and community needs continued to grow, the Foundation board chose business executive Barbara Hughes to replace Kay Marquet as president and chief executive officer. Hughes, who was selected from among 90 applicants, was a former senior vice president at Fireman's Fund Insurance and an interim executive director for the California Association of Food Banks.

"We knew it was a pivotal time for the Foundation, and we were looking for the kind of leader who could help us take that huge next step. Barbara had experience in for-profit organizations, in nonprofit volunteering and in nonprofit consulting. We felt it was a really good balance of disciplines," said Joan Woodard, the board member who headed the search committee, and the CEO and president of Simons & Woodard.

Hughes took the reins in May 2009, at a time when the board was looking for ways the Foundation could fulfill its long-term mission and still respond to the immediate needs of a community where people were losing their homes, their jobs and their health insurance.

"We were going through a period of great change," said Barbara Graves, a board member during the transition period. "There was a lot of concern about responding appropriately to the economic environment and meeting the needs of our community.

"More people were hungry and more people were out of work, and we were going out trying to raise additional funds," Graves said. "Many of our donors responded very generously: People who had been working with us through the years realized this was a time of real need."

As a result of that concern, the board looked for ways to increase its community impact and address some of the most basic needs of the community. It adopted a strategic plan that, among other things, changed the Foundation's funding strategy.

In prior years, the Foundation had sought competitive grants in the field of human services. In 2010, however, the board gave its entire discretionary funding for human services—\$60,000—to the Redwood Empire Food Bank and sought matching grants from its donors. The final contribution totaled \$130,000, enough to provide two million pounds of fresh produce to people served by the food bank and its 157 affiliates.

The board also committed its discretionary funding for the environment to a single entity by awarding a multiyear set of grants to the North Bay Climate Adaptation Initiative, a coalition of 15 local organizations doing original research on the impact of climate change on Northern California plants and animals. The research follows up on the group's earlier publication, *Biodiversity Action Plan: Priority Actions to Preserve Biodiversity in Sonoma County*.

The Foundation continued funding for groups focusing on homelessness, while the board's Civic Engagement Committee convened community groups to learn more about the needs of the underserved. This led to the creation of a neighborhood grants program that provides

up to \$2,000 to organized groups working on health or safety issues in their neighborhoods. Eligible groups include neighborhood associations and residents of apartment complexes, mobile home parks or farm worker camps.

Neighborhood grant recipients in 2011 included Windsor Bloco, a youth drum and dance after-school program; the McDowell Garden Association, for supplies for a community garden; and the Linwood Neighborhood Watch Group, to publish and distribute an educational biannual newsletter.

Board members and former board members continued to bring critical issues to the board's attention. Herb Dwight, a longtime board member, was concerned about the high number of teens dropping out of school. He proposed, and the board approved, the creation of "Scholarship Sonoma County," a partnership with 10,000 Degrees, a successful project of the Marin Community Foundation that encourages teens to remain in school and offers need-based scholarships to those who do.

Scholarship Sonoma County has its own executive director and does its own fundraising, with a goal of providing scholarship counseling and a wide number and variety of scholarships. It will bring together the Foundation's existing scholarship programs and invite additional scholarship programs from other community groups and donors.

"My hope is that we can raise a lot of money for scholarships to send young people on to higher educational experiences," said Dwight. "I think it's one of the most effective ways to help young people lift themselves up and enjoy a better standard of living."

The endeavor represents a significant commitment by the Foundation to the county's young people. "We currently give \$200,000 in scholarships a year. Our goal is to expand that amount by 10 times—to \$2 million—in the next five years," Hughes said.

Scholarship Sonoma County will benefit the community as well as the students, Hughes said. "It's not just because we want individual success. A well-educated workforce is a success for the area, because it makes it possible to attract companies that stimulate our economy and provide more than just service jobs."

"It may also be a boon to donors who want to set up scholarship programs, but find it's too difficult and costly to do it on their own," said Albert Handelman, a former board chair.



Oliver Ranch Installation—Roger Berry, "Darwin," 1988–89 (Corten steel sculpture)
Photo: Oliver Ranch

Another significant achievement for the Foundation came in 2009, when, after several years of discussions, Steve and Nancy Oliver partnered with Community Foundation Sonoma County to create the Oliver Ranch Foundation as a supporting organization of the Community Foundation.

Their 100-acre Oliver Ranch near Geyserville is home to 18 remarkable site-specific sculptures and installations by leading artists who were commissioned by the Olivers to create works "responding to the land." The ranch is now recognized nationally and internationally as a significant art collection.

As a supporting organization, the Oliver Ranch Foundation enjoys more tax and regulatory benefits that it could as an independent entity. The Olivers were also able to assure their vision for the ranch would continue in perpetuity and that they could leave the ranch in local hands.

“The Oliver Ranch is a priceless asset in the Sonoma County arts and culture scene that, by its singular presence and renown, lifts all other arts organizations higher,” said Schulz, who is also a member of the Oliver Ranch Foundation Board.

In 2009, Sonoma Valley benefactors Hazel and Roland Todd passed away. Their Trust became an \$8.5 million endowment, the second largest bequest the Foundation has ever received, and one of the largest charitable gifts in the history of Sonoma County. The Todds’ endowment will provide \$350,000 a year, in perpetuity, for the causes they held dear—the health and well being of Sonoma Valley residents and the sick and needy of Sonoma County.

The Foundation created a Todd Trust team, with members from Sonoma Valley and the Foundation board and staff, to evaluate community needs and determine the best use of the Todd funds. The team conducted in-depth interviews with 75 community organizations, elected officials and members of the community. The Sonoma County Economic Development Board provided them with the latest economic information, future indicators, and statistics about Sonoma Valley communities.

A consultant team from the North Bay Organizing project was then hired to identify ways of improving the health and well-being of residents of the Springs area and to assist local leaders in improving their organizing skills.



In 2012, the Foundation awarded \$175,000 in Todd Trust grants for projects in the Sonoma Valley area. These included, among other things, the purchase of a mobile dental van, funding for emergency rental assistance, and the creation of a community garden.

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

In March 2012, after three years at the helm, Hughes announced her intention to retire, and the board launched a search for a new President and CEO.

The Foundation marked the end of 2012 with \$153.5 million in assets. Over the course of 30 years, it has given more than \$128.5 million and made 11,287 grants to organizations and individuals to benefit the community and community organizations.

8 *Looking Forward*

Pete Golis, Chair, Board of Directors 2011–2012

Thirty years ago, a handful of people believed in a unique concept—a thriving Community Foundation with a permanent endowment that would benefit the people of Sonoma County now and forever.

Their optimism and determination paid off. An initial investment of \$9,000 has grown to more than \$153 million in 2012, and more than \$128 million has been distributed to countless organizations and individuals in support of health and human services, the arts, education and the environment. The Foundation also has gained a reputation for bringing together community groups to help the hungry and the homeless, children in need, scientists researching the impacts of climate change, immigrant families and programs that support emerging artists.

Today, as we look forward, we are invited to ask: What now?

Well, what we know is that what mattered in 1983 still matters today. Which is to say: There is still work to do.

In 2013, we renew our commitment to the future with the arrival of a new president and CEO, Elizabeth (Beth) Brown. Recruited after a nationwide search, she brings a wealth of experience to Sonoma County. At different times, Brown was both vice president for programs and vice president for philanthropic services at the Marin Community Foundation. She has also worked in the trust division of the Bank of America and at the Council on Foundations in Washington.

As a board of directors, we're confident her leadership will inspire everything we do, helping us grow and adapt to meet the community's needs.

In 1983, the Community Foundation sprang from the conviction that local leaders must respond to an economic recession and reductions in government services. Today, we find ourselves slowly emerging from an even more damaging recession. We will need to build on the things we've done in the past and stretch ourselves even further, working with our generous donors to help those who need our help. The world may change, but the Community Foundation will remain as an affirmation of our commitment to private philanthropy.

As always, our job is to support the aspirations of donors and to understand the needs of the communities we serve. To get the job done, we bring people together for the greater good, invest prudently, manage our business wisely and keep imagining a better future.

Our value must be measured in lives, not dollars. How do you measure the life of a young person who is less likely to join a gang because Chop's Teen Club is there? What is the value of protecting a breathtaking landscape for public enjoyment and scientific research at Pepperwood Preserve? What does it mean to a person without a home to have shelter for the night at Samuel L. Jones Hall?

In looking forward, we also look back. The first mission statement of that fledgling Foundation will guide us now, as it did nearly 30 years ago: "To provide, in perpetuity, for the enrichment of the quality of life in Sonoma County."

Some familiar tools will serve us well. We must listen to what people have to say. We must bring stakeholders to the table to talk about how all of us—together—can accomplish more. We must recruit the smartest, most experienced people we can find to help with development, distribution, investments and best practices. In all its decisions, the Foundation's Board of Directors relies on experienced staff for the comprehensive, contextual analysis that leads to better, more focused long-term decisions.

At the same time, we also are obliged to keep up with a world that is changing at light speed. We must reach out to new residents in new neighborhoods. We must understand the impacts of a global economy on prosperity here at home. We must harness technology and social networks to reach out to future generations of philanthropists.

We must remain flexible and change to meet the community's changing needs, just as we have in the past, when we committed to emergency services for those on the verge of homelessness and created a vibrant Arts District in Santa Rosa.

Our new initiatives in 2012 included an ambitious scholarship program designed to help local kids go to college and stay in college, a grants program designed to empower neighborhoods, a Todd Trust project that advances health and well-being in the Boyes Hot Springs area, and a series of collaborations designed to rethink how we can help the hungry, the homeless and troubled youngsters. These initiatives respond to a time in which people who never expected to be hungry or homeless need our help.

We owe so much to the inspiration, generosity and hard work of the community leaders who made this happen. We carry the responsibility to be wise stewards of their legacy. We are humbled by the challenge and grateful for the opportunity to write new chapters of this story.

The story of the Community Foundation is a rich tapestry of the interwoven skills, dedication, experience and insight of the many people who have given their time and energy to help it grow. We are indebted to the many donors whose generosity and idealism inform and make possible everything we do. We offer our gratitude to Louise Levinger and Jean Schulz, two people with an idea that would enrich the county in countless ways, and to community leaders who have served on the Board of Directors and on committees and shared their wisdom with us. Our appreciation also goes to the talented CEOs and staff members who manage the day-to-day business of the Foundation and keep us all on an even keel.

In looking forward, we also look back. The first mission statement of that fledgling Foundation will guide us now, as it did nearly 30 years ago: "To provide, in perpetuity, for the enrichment of the quality of life in Sonoma County."

Time Line

1983

- The Community Foundation of Sonoma County is formed by a group of civic-minded citizens who are concerned about the shortage of government funding for human services and the impact that might have on local charitable organizations.
- They decide to create an endowment program that will accept and distribute funds in perpetuity. Numerous meetings are held to determine the role of the Foundation in the community, how to structure the endowments they hope to receive, and to decide organizational issues, including bylaws and the composition, function and size of the Board of Directors.

They also decide on a mission: “To provide, in perpetuity, for the enrichment of the quality of life in Sonoma County by encouraging philanthropy throughout the community; providing a service and vehicle for donors with varied interests and at various levels of giving; assessing and responding to emerging and changing community needs and opportunities; serving as a resource and catalyst for charitable activities; and developing a permanent endowment for the community.”

- On August 4, the Foundation is incorporated as the Community Foundation of Sonoma County, a nonprofit public benefit corporation “for the preservation and enhancement of the quality of life in Sonoma County.”
- The first board meets on September 1 with \$9,000 in start-up money. Founding board members include Ed Anderson (president), Frank Collum, John Doolittle, Neil Ferguson, Robert Kerr, Louise Levinger, John Moskowitz, Thomas Passalacqua, Ed Pisenti, Jean Schulz, Andrew Shepard, Henry Trione, Royce Van Bebber, David Viviani and Barbara Walter.

1984

- The Community Foundation makes its first major grant—\$34,346 to the Santa Rosa Symphony for the purchase of a Hamburg Steinway piano that is still in use today. The Symphony had been using the grand piano belonging to Santa Rosa High school.
- Rolf Illsley, cofounder of Optical Coating Laboratory, Inc. (OCLI), donates \$10,000. The money is used for four grants of \$1,500 each in the areas of arts, education, human services and the environment. The rest of the donation is placed in the endowment fund.
- The Santa Rosa Foundation, created in 1932 through a bequest from Leonard Howarth, merges into the Community Foundation. The Santa Rosa Foundation brings with it a 52-year history of philanthropy and nearly \$90,000, which will be used to supplement Santa Rosa city funding and establish the Sonoma County Museum.

1986

- Virginia Hubbell, whose background includes philanthropy and the arts, is hired as the Foundation's first executive director. The Foundation now has \$375,000 in assets. Hubbell and her assistant work in offices donated by architects Simons & Brecht at 707 Second Street in Santa Rosa.
- It is a period in which the Foundation struggles to find its niche and raise its visibility. It recognizes it can become a neutral convener of community organizations, facilitating work toward a common goal. At the suggestion of Jean Schulz, it offers mini-grants to organizations with modest needs, for example, money for materials so parishioners could paint their small church.
- Youth endowment funds are begun as a way of teaching a younger generation about the value of charitable giving. Grandparents or other relatives create a donor-advised fund, but the grandchild or child chooses the charities to which the money will go.

1987

- The Foundation changes its name from Community Foundation of Sonoma County to Sonoma County Foundation out of concern that the word "community" is confusing to donors and recipients.
- The Foundation launches its first major project—bringing parent education to workplaces, schools and churches around Sonoma County. The successful program is highlighted in a seminal and still-cited book about community foundations, *An Agile Servant: Community Leadership by Community Foundations*, edited by Richard Magat for the Council on Foundations in Washington, D.C., and published in 1989.

1988

- **In the five years since the Community Foundation was formed, assets have grown from \$9,000 to \$1.3 million.**
- The Foundation creates its first Designated Fund with KRCB, the local educational television station, as the recipient. A Designated Fund is a permanent endowment established by an individual with a specific organization as the recipient. In this case, Jean Schulz was the donor, and the funding provides KRCB with a steady stream of income.
- The Foundation moves its offices into the Atrium Court at 1260 North Dutton Street, Suite 280, in Santa Rosa.

1989

- The National Endowment for the Arts, with whom Virginia Hubbell had a prior relationship, gives a four-year grant of \$50,000 a year to help the Community Foundation establish an arts funding program. The Community Foundation must raise \$100,000 for a permanent endowment each year in order to receive the grant.

- With the help of a grant from the James Irvine Foundation, the Community Foundation sponsors “Heritage Days” in Sonoma and Healdsburg, celebrating the ethnic diversity of the communities. The Irvine Foundation has pledged a three-to-one matching grant of \$200,000 to support arts programs.

1990

- The Foundation changes its name to Sonoma County Community Foundation, and moves its offices to the northern edge of Santa Rosa at 3550 Round Barn Boulevard, Suite 212.

1991

- Virginia Hubbell steps down as executive director in December 1991. During her tenure, Community Foundation assets have grown to \$4.3 million and 28 individual funds have been established.

1992

- The Board of Directors hires Kay Marquet, the executive director of the Greater Worcester Community Foundation in Massachusetts, to replace Virginia Hubbell.
- The Foundation makes its first program-related investment. Local television station KRCB, Channel 22, is the recipient. The station is given a loan from the permanent endowment created for it in 1988, and must repay the loan with interest. The money is used to create a local radio station.
- Jean and Charles Schulz, the Foundation’s most significant donors, pledge an additional \$100,000 annually for five years.

1993

- Ten years after it began, the Foundation reaches \$5 million in assets, a figure that historically has been considered the “takeoff” point in the life of a community foundation. In its first 10 years, the Community Foundation has given \$1.6 million in grants and scholarships to benefit Sonoma County.

1995

- Santa Rosa attorney and banker Charles “Chop” DeMeo dies on May 6, 1995, leaving \$16 million to the Community Foundation for a club for Santa Rosa teens and to help homeless mothers with young children. It is—and remains to this day—the largest single charitable gift ever made in Sonoma County.

The Foundation grants the DeMeo home, then valued at \$165,000, to Catholic Charities as a transitional home for two homeless mothers at a time, along with their children, and underwrites the cost of operating the home.

The Foundation also takes the first steps toward creating a teen club in Santa Rosa Railroad Square to be called Chop's. The club is eventually operated as DeMeo Teen Club, Inc., which becomes the Community Foundation's first supporting organization.

- The Foundation revises its mission statement to read: "The mission of Community Foundation Sonoma County—Matching philanthropic interests with community needs by: Serving as a leader, resource and catalyst to enrich the quality of life; developing a permanent endowment; encouraging philanthropy at all levels; providing comprehensive donor services; responding to changing community needs and opportunities."

1996

- The Legacy Society is created for people who leave a gift to the Community Foundation from their estates in the form of a bequest, charitable remainder trust, gift of life insurance or any one of the other types of charitable planned gifts.

1998

- The Community Foundation launches the Resilient Communities Initiative, funded by a five-year \$1.25 million grant from the James Irvine Foundation. The project promotes community building and supports youth programs in Cloverdale and the unincorporated area of Sonoma Valley known as "The Springs."
- The Foundation moves its offices to downtown Santa Rosa in the historic Rosenberg's Department Store, now Barnes & Noble, at 250 D Street, Suite 205.

1999

- The Community Foundation convenes Shelter Solutions, a task force aimed at finding ways to reduce homelessness. The committee includes representatives from the city of Santa Rosa, the county of Sonoma and the Task Force for the Homeless. The group eventually sites three shelters offering homeless services—Samuel L. Jones Hall, the Brookwood Avenue Homeless Shelter and the Russell Avenue Homeless Shelter, all in Santa Rosa.

2001

- Chop's Teen Club opens, funded by the DeMeo bequest. Within a year, more than 1,000 students are using the 21,000-square-foot facility in Santa Rosa's West End neighborhood.
- A bronze sculpture of Charlie Brown and Snoopy (the creations of cartoonist and Foundation benefactor Charles Schulz) is dedicated in Depot Park in Railroad Square. The Foundation raised more than \$300,000 for the sculpture, working in partnership with the city of Santa Rosa and the Cultural Arts Council of Sonoma County.
- The Foundation changes its name to Community Foundation Sonoma County to emphasize that the Foundation is not part of county government.

2002

- The Charles M. Schulz Museum and Research Center opens its doors, funded by an \$8 million grant from the Schulz Fund, one of the funds in the Community Foundation.

2003

- The Healdsburg Area affiliate is created to raise funds and manage grant programs that benefit residents of the greater Healdsburg area. The affiliate has a volunteer advisory board and works with local donors to serve the needs of area nonprofit organizations.
- The Foundation funds a prevention program for youth at risk for juvenile diabetes, the first of its kind in the United States. The innovative program receives national attention and is featured in the national *Chronicle of Philanthropy*.
- An anonymous donor gives the Foundation \$2 million to use for long-term support and services for homeless adults. The donor names it “Betty’s Fund.”
- **At its 20th anniversary, the Foundation has \$88.3 million in assets. Over the past 20 years it has given 3,248 grants and scholarships to 992 different organizations totaling more than \$47 million.**

2004

- Sonoma Paradiso Foundation becomes a second supporting organization of the Foundation with a focus on helping children in need.
- The James Irvine Foundation awards the first of two major grants, totaling \$900,000, to advance the arts in Sonoma County. Working in partnership with the Arts Council of Sonoma County, the Foundation produces arts festivals, establishes the first annual juried artists’ awards program in the county, creates a destination website for the arts and prepares a lecture series to help artists manage the business side of their careers. The funding is also used to facilitate the creation of the Santa Rosa Arts District on A Street.

2005

- The Samuel L. Jones Hall opens its doors to the homeless. With 120 beds, it is the largest adult homeless shelter in Northern California, and provides dinners, showers and cots for the night as well as counseling services, medical referrals, and job counseling and placement.
- The Pepperwood Foundation, established by Jane and Herb Dwight, becomes a supporting organization of the Community Foundation. The Pepperwood Foundation owns the 3,200-acre Pepperwood Preserve, an area of rich biodiversity and beauty near the divide of the Napa and Russian Rivers, now permanently designated as wild land.

2006

- The Sonoma Valley Fund becomes the second community-based affiliate of the Community Foundation. The advisory board is composed of Sonoma Valley residents and the goal is to encourage legacy giving to Sonoma Valley nonprofits.
- The Foundation changes its mission statement to read: “The mission of the Community Foundation Sonoma County is to strengthen our local communities through effective philanthropy and civic engagement.”

2009

- Kay M. Marquet steps down as president and CEO. During her tenure, the Foundation’s assets have grown from \$4.3 million to more than \$137 million, and the staff has expanded from four to 15 people. The Foundation now administers 450 funds, serving a wide variety of charitable purposes.
- In May, Barbara Hughes, whose background includes business and nonprofit consulting, becomes president and CEO of the Community Foundation.
- The Oliver Ranch Foundation joins the Community Foundation as a supporting organization, a financial structure that assures that Steve and Nancy Oliver’s vision for their ranch, with its arts programs and unique, site-specific sculptures, will continue in perpetuity.
- Longtime Sonoma Valley residents Roland and Hazel Todd die, leaving a bequest of \$8.5 million to the Community Foundation, the second-largest bequest in the Foundation’s history. The money is to be used to support charitable activity, primarily in the Sonoma Valley, in the areas of health and human services, especially for the sick, needy and elderly; underfunded governmental services, such as local fire, library and health care districts; and open space acquisition, specifically land and trail acquisition.

2010

- The Community Foundation uses its discretionary health and human services budget (\$60,000) and, together with challenge grants, provides \$130,000 to the Redwood Empire Food Bank and 157 other programs in their efforts to end hunger.
- The board awards a multiyear set of grants to the North Bay Climate Adaptation Initiative (NBCAI) to support their innovative, long-term work on climate change in Sonoma County. NBCAI is a voluntary collaboration of scientists, environmental organizations, policymakers, land managers and local funders.

2012

- The Community Foundation makes its first awards from the Todd Trust, a total of \$288,350, for a broad spectrum of community projects. Among them are a mobile dental van, a community garden, ESL classes, emergency rental assistance for low-income Sonoma Valley residents, and programs aimed at youth and schools. The Foundation also hires two experienced community organizers to undertake community development work in the Springs area to increase access to health and human services.

- The Foundation creates and fills a new position, Program Officer for Arts and Education, to assure the organization can continue to play a leadership role in the arts community.
- After three years at the helm, Barbara Hughes announces in March that she will be leaving the Foundation at the end of the year.
- In November, after a nationwide search, the Board named Elizabeth (Beth) Brown to succeed Hughes as the Foundation's President and CEO. Brown was formerly Vice President for Programs at the Marin Community Foundation.
- **The Foundation marked the end of 2012 with \$153.5 million in assets. Over the course of 30 years, it has given more than \$128.5 million in grants and scholarships to benefit the community and community organizations.**



Photo: Silvio Fiorano

The Community Foundation has sponsored heritage festivals that have brought arts groups together from all over the county, including support for the annual Cinco de Mayo celebration in Roseland.

Why a Community Foundation?

A community foundation, by its very nature, provides a unique service to philanthropically minded donors and to the community it serves. Its primary goal is to provide an ongoing source of revenue for charitable causes through its permanent endowments, but it also enhances the quality of civic life: It expands the number of people who donate for the public good and are thus invested in it, and it brings stability to other nonprofit organizations through leadership and grantmaking.

There are other notable benefits from community foundations:

- A community foundation democratizes philanthropy, making philanthropy possible not just for the Carnegies and the Rockefellers, but for individuals, families and businesses at every income level.
- A community foundation focuses on the community as a whole, rather than a particular cause, providing annual grants in the arts, education, the environment, and health and human services. It also provides leadership by bringing together other organizations and individuals to work collaboratively around a community need and, when appropriate, may foster the merging of functions.
- A community foundation attracts donors because of its flexibility and community knowledge, its ability to change with changing times, its management and tax advantages, and a unique endowment structure that allows donors to set aside funds with an annual payout that will benefit the community forever. (All grants are ultimately approved by the foundation's board of directors, which reports to the community through the annual report and Form 990 tax returns.)
- A community foundation allows donors to contribute to an existing fund or establish a fund in their own field of interest or to benefit a specific nonprofit organization. A community foundation can also bring donors together around a shared field of interest, creating an environment in which donors become more informed, engaged and generous and generally find the giving experience more rewarding.
- A community foundation acts as a fiscal sponsor for appropriate projects and events that bring communities together and enhance the sense of community, but that otherwise might not occur.

So how has Community Foundation Sonoma County done?

Over the past 30 years, the Foundation has distinguished itself nationally for its innovative programs and its ability to serve both its donors and the community at large. With \$153.5 million in assets in 2012, it has become one of the largest charitable organizations in Northern California.

Its collaborative efforts have brought together like-minded community groups and even adversaries on the crucial issues of our time: homelessness, at-risk youth, hunger and the environment.

Those efforts have resulted in the creation of Chop's Teen Club in Santa Rosa; construction of Samuel L. Jones Hall, Northern California's largest homeless shelter; preservation of the unique habitat and educational potential of Pepperwood Preserve; and conservation of the site-specific, internationally known sculptures of Oliver Ranch.



Photo: Jill Catherine Newman

Grants, large and small, have been awarded each year for a variety of community purposes. Many have helped smaller nonprofits survive and thrive, bringing stability to those organizations and the services they provide. Grants have helped the Graton Day Labor Center with worker employment; assisted the Santa Rosa Symphony, including the purchase of a grand piano; created an annual artists' awards program; and provided scholarships to thousands of students to advance their education.



Photo: Jill Catherine Newman

The Foundation has also provided fiscal sponsorship for meaningful community projects and events such as the gazebo on Healdsburg Plaza, the statue of Snoopy and Charlie Brown in Railroad Square, and the heritage festivals in Healdsburg and Sonoma.

The measure of the Community Foundation, however, is not only in the dollars it has granted—over \$128.5 million in grants and scholarships over three decades—but in the lives it has changed and continues to change:

- What is the difference in the lives of thousands of students who received grants and scholarships and were able to go on to higher education?
- How do you measure the value of Chop's Teen Club for young people who might otherwise drift into gangs?
- What is gained when an entire community embraces its diverse ethnic heritage and comes together for joyous festivals?
- How are our lives enriched when our artists and their art are nourished?
- What is it worth to protect Pepperwood Preserve and the hope it holds for native plants and animals under pressure from climate change?
- What does it mean for a homeless person to have shelter on a cold, rainy night at Samuel L. Jones Hall?

When generous donors come together to share their assets and community-spirited citizens volunteer their time and wisdom, good things can happen for us all.

Appendix B

Assets^{*}

1983—\$9,000
1984—\$46,000
1985—\$71,000
1986—\$375,000
1987—\$580,000
1988—\$1.3 million
1989—\$2.3 million
1990—\$3.5 million
1991—\$4.1 million
1992—\$4.3 million
1993—\$5.1 million
1994—\$5.8 million
1995—\$23.4 million
1996—\$25.2 million
1997—\$45.6 million
1998—\$48.8 million
1999—\$65.0 million
2000—\$85.9 million
2001—\$81.5 million
2002—\$76.2 million
2003—\$88.3 million
2004—\$99.1 million
2005—\$114.5 million
2006—\$132.8 million
2007—\$136.7 million
2008—\$112.5 million
2009—\$142.7 million
2010—\$152.2 million
2011—\$146.5 million
2012—\$153.5 million

*Figures were obtained from Foundation annual reports and other Foundation documents.

COMMUNITY FOUNDATION SONOMA COUNTY

Established 1983

We are governed by a president/CEO and a Board of Directors representing a cross section of Sonoma County's business, civic and philanthropic leaders.

We have four supporting organizations. A Supporting Organization is a separate community-benefit corporation that operates under the Community Foundation's charitable umbrella.

- DeMeo Teen Club, Inc.
- Oliver Ranch Foundation
- Pepperwood Foundation
- Sonoma Paradiso Foundation

We have two regional affiliates. Each affiliate has a board of local volunteers who bring together charitable donors, community leaders and nonprofit organizations with an understanding of local needs and opportunities.

- Healdsburg Area affiliate, established in 2003, serves the greater Healdsburg area, including Geyserville
- Sonoma Valley Fund, created in 2006, serves the greater Sonoma area, including Boyes Hot Springs

The hundreds of grants distributed and the hundreds of funds established under the Foundation umbrella reflect the charitable intent of our donors and the multitude of not-for-profits that benefit from our donors.



Oliver Ranch Installation — Richard Serra, "Snake Eyes and Boxcars," 1990–93 (six pairs of forged hyper-dense Corten steel blocks)
Photo: Oliver Ranch

Boards of Directors – by Year and by Name

Boards of Directors by Year*

Founding Board of Directors, 1983

Edwin Anderson, Jr., President
 Frank Collum
 John Doolittle
 Neil Ferguson
 Robert Kerr
 Louise Levinger
 John Moskowitz
 Thomas Passalacqua
 Edward Piseni
 Jean F. Schulz
 Andrew Shepard
 Henry Trione
 Royce Van Bebber
 David Viviani
 Barbara Walter

1984

Edwin Anderson, Jr., President
 Frank Collum
 Harrison Comstock
 John Doolittle
 Neil Ferguson
 Schuyler Jeffries
 Robert Kerr
 Arthur Lafranchi
 Louise Levinger
 Olive McWain (Kerr)
 John Moskowitz
 Ambrose Nichols
 Thomas Passalacqua
 William Pedersen
 Edward Piseni
 John H. C. Riley
 Al Said
 Andrew Shepard
 Jean F. Schulz
 Eugene Traverso
 Henry Trione
 Royce Van Bebber
 David Viviani
 Barbara Walter

1985

Edwin Anderson, Jr., President
 Frank Collum
 Harrison Comstock
 John Doolittle
 Neil Ferguson
 J. Barrie Graham
 Schuyler Jeffries
 Arthur Lafranchi
 Louise Levinger
 Olive McWain (Kerr)
 John Moskowitz
 Ambrose Nichols
 William Pedersen

Edward Piseni
 John H. C. Riley
 Al Said
 Jean F. Schulz
 Eugene Traverso
 Royce Van Bebber
 David Viviani
 Barbara Walter
 Paul Wright

1986

John Moskowitz, President
 Edwin Anderson, Jr.
 Frank Collum
 Harrison Comstock
 John Doolittle
 Neil Ferguson
 J. Barrie Graham
 Nancy M. Henshaw
 Dorothe Hutchinson
 Schuyler Jeffries
 Arthur Lafranchi
 Louise Levinger
 Olive McWain (Kerr)
 Ambrose Nichols
 William Pedersen
 Edward Piseni
 John H. C. Riley
 Jean F. Schulz
 John Shanahan
 Eugene Traverso
 Royce Van Bebber
 David Viviani
 Barbara Walter
 Paul Wright

1987

Arthur Lafranchi, President
 Edwin Anderson, Jr.
 Harrison Comstock
 John Doolittle
 J. Barrie Graham
 Nancy M. Henshaw
 Dorothe Hutchinson
 Schuyler Jeffries
 Louise Levinger
 Olive McWain (Kerr)
 John Moskowitz
 Ambrose Nichols
 Edward Piseni
 C. William Reinking
 John H. C. Riley
 Jean F. Schulz
 John Shanahan
 Victor S. Trione
 David Viviani
 Barbara Walter

1988

Jean F. Schulz, President
 Edwin Anderson, Jr.
 Harrison Comstock
 John Doolittle
 Thomas C. Freeman
 Gary Heck
 Nancy M. Henshaw
 Dorothe Hutchinson
 Schuyler Jeffries
 Arthur Lafranchi
 Louise Levinger
 Olive McWain (Kerr)
 John Moskowitz
 Ambrose Nichols
 Edward Piseni
 C. William Reinking
 John H. C. Riley
 John Shanahan
 Victor S. Trione
 Kirk Veale
 David Viviani
 Barbara Walter

1989

Jean F. Schulz, President
 Edwin Anderson, Jr.
 Lee Chandler
 Harrison Comstock
 John Doolittle
 Thomas C. Freeman
 Nancy M. Henshaw
 Dorothe Hutchinson
 Schuyler Jeffries
 Arthur Lafranchi
 Louise Levinger
 Olive McWain (Kerr)
 John Moskowitz
 Ambrose Nichols
 Edward Piseni
 C. William Reinking
 John H. C. Riley
 John Shanahan
 Jack Taylor
 Victor S. Trione
 Kirk Veale
 David Viviani
 Barbara Walter

1990

John Shanahan, President
 Peggy J. Bair
 Les Belden
 Lee Chandler
 Harrison Comstock
 Patricia Cordero
 John Doolittle

*The names and titles of directors and the dates of their terms were obtained from Community Foundation documents (for the years 1983–1991) and from Community Foundation annual reports (for the years 1992–2011).

Thomas J. Farrell
Thomas C. Freeman
Nancy M. Henshaw
Dorothe Hutchinson
Richard J. Indermill
Schuyler Jeffries
Arthur Lafranchi
Louise Levinger
Olive McWain (Kerr)
John Moskowitz
Ambrose Nichols
C. William Reinking
Dee Richardson
John H. C. Riley
Jean F. Schulz
Jack Taylor
Victor S. Trione
Kirk Veale
Barbara Walter

1991

John Shanahan, President
Peggy J. Bair
Les Belden
Lee Chandler
Rev. James E. Coffee
John Doolittle
Thomas J. Farrell
Thomas C. Freeman
Benny Friedman
Nancy M. Henshaw
Dorothe Hutchinson
Richard J. Indermill
Lucy Kishaba
Claire Lampson
Stanley Lance
Louise Levinger
Mark Matthews
John R. O'Brien
Rhoann Ponseti
C. William Reinking
Dee Richardson
Jean F. Schulz
Jack Taylor
Victor S. Trione
Kirk Veale

1992 Annual Report

Peggy J. Bair, President
Lee Chandler, Vice President
John T. Blount
F. James Brock, Jr.
Rev. James E. Coffee
Harrison Comstock
Thomas J. Farrell
Thomas C. Freeman
Harry Friedman
Barbara D. Gallagher
Nancy M. Henshaw
Richard J. Indermill
Lucy Kishaba

Claire Lampson
Mark Matthews
John R. O'Brien
Peter Piasecki
Rhoann Ponseti
C. William Reinking
Dee Richardson
Jean F. Schulz
John Shanahan
Jack Taylor
Victor S. Trione
Kirk Veale
Thomas P. Ward

1993 Annual Report

John R. O'Brien, President
Lee Chandler, Vice President
Dee Richardson, Secretary
Peggy J. Bair, Treasurer
Ruben Armiñana, Ph.D.
John T. Blount
F. James Brock, Jr.
Rev. James E. Coffee
Harry Friedman
Peggy J. Furth
Barbara D. Gallagher
Lucy Kishaba
Claire Lampson
Dan Libarle
Mark Matthews
Peter Piasecki
Rhoann Ponseti
Irwin S. Rothenberg
Jean F. Schulz
Jack Taylor
Kirk Veale
Thomas P. Ward

1994 Annual Report

John R. O'Brien, President
Lee Chandler, Vice President
Peggy J. Furth, Secretary
Irwin S. Rothenberg, Treasurer
Ruben Armiñana, Ph.D.
Peggy J. Bair
John T. Blount
F. James Brock, Jr.
Jeanne M. Buckley
Harry Friedman
Barbara D. Gallagher
Carla Howell
Patrick Kilkenny
Lucy Kishaba
Mark Matthews
Peter Piasecki
Rhoann Ponseti
Dee Richardson
Jean F. Schulz
Kirk Veale

1995 Annual Report

Lee Chandler, President
Patrick Kilkenny, Vice President
Peggy J. Furth, Secretary
Irwin S. Rothenberg, Treasurer
Ruben Armiñana, Ph.D.
Peggy J. Bair
F. James Brock, Jr.
Jeanne M. Buckley
Harry Friedman
Barbara D. Gallagher
J. Barrie Graham
Carla Howell
Lucy Kishaba
Mark Matthews
John R. O'Brien
Peter Piasecki
Rhoann Ponseti
Dee Richardson
Jean F. Schulz
Kirk Veale
Cathleen Vicini

1996 Annual Report

Patrick Kilkenny, President
Rhoann Ponseti, Vice President
Peggy J. Furth, Secretary
Irwin S. Rothenberg, Treasurer
Ruben Armiñana, Ph.D.
Dan B. Benedetti
F. James Brock, Jr.
Jeanne M. Buckley
Loretta Carr
Lee Chandler
Bradford J. DeMeo
Harry Friedman
Barbara D. Gallagher
J. Barrie Graham
Lucy Kishaba
John R. O'Brien
Jean F. Schulz
Martin Teitel
Cathleen Vicini
Reuben Weinzveg

1997 Annual Report

Rhoann Ponseti, President
J. Barrie Graham, Vice President
Loretta Carr, Secretary
Irwin S. Rothenberg, Treasurer
Ruben Armiñana, Ph.D.
Dan B. Benedetti
F. James Brock, Jr.
Jeanne M. Buckley
Bradford J. DeMeo
Harry Friedman
Peggy J. Furth
Barbara D. Gallagher
Patrick Kilkenny
Jean F. Schulz

Carlos Tamayo
Cathleen Vicini
Reuben Weinzveg
Mike Welty

1998 Annual Report

Rhoann Ponseti, President
J. Barrie Graham, Vice President
Loretta Carr, Secretary
Irwin S. Rothenberg, Treasurer
Jeannette Anglin
Ruben Armiñana, Ph.D.
Dan B. Benedetti
Jeanne M. Buckley
Dan Condrón
Bradford J. DeMeo
Harry Friedman
Patrick Kilkenny
Deborah A. Meekins
Jean F. Schulz, ex officio
Carlos Tamayo
Cathleen Vicini
Reuben Weinzveg
Mike Welty
Henry Wendt

1999 Annual Report

J. Barrie Graham, Chairman
Bradford J. DeMeo, Vice Chairman
Loretta Carr, Secretary
Patrick Kilkenny, Treasurer
Jeannette Anglin
Dan B. Benedetti
Jeanne M. Buckley
Dan Condrón
Judith L. Jordan
Deborah A. Meekins
Jean F. Schulz, ex officio
Ernest Shelton
Carlos Tamayo
Paula Thomas
Neva Turer
Cathleen Vicini
Reuben Weinzveg
Mike Welty
Henry Wendt

2000 Annual Report

J. Barrie Graham, Chair
Bradford J. DeMeo, Vice Chair
Dan Condrón, Secretary
Reuben Weinzveg, Treasurer
Jeannette Anglin
Dan B. Benedetti
Jeanne M. Buckley
Loretta Carr
Mary T. Colhoun
Herbert M. Dwight, Jr.
Judith L. Jordan
Deborah A. Meekins
Jean F. Schulz, ex officio

Ernest Shelton
Paula Thomas
Neva Turer
Cathleen Vicini
Henry Wendt

2001 Annual Report

Henry Wendt, Chair
Dan Condrón, Chair and Secretary
Reuben Weinzveg, Treasurer
Jeannette Anglin
Dan B. Benedetti
Jeanne M. Buckley
Mary T. Colhoun
Bradford J. DeMeo
Herbert M. Dwight, Jr.
J. Barrie Graham
Judith L. Jordan
Deborah A. Meekins
Jean F. Schulz, ex officio
Ernest Shelton
Paula Thomas
Neva Turer
Glenn Yamamoto

2002 Annual Report

Henry Wendt, Chair
Dan Condrón, Secretary
Reuben Weinzveg, Treasurer
Jeannette Anglin
Mary T. Colhoun
Chris Dobson
Herbert M. Dwight, Jr.
Barbara Graves
Judith L. Jordan
Jean F. Schulz
Ernest Shelton
Paula Thomas
Neva Turer
Francisco H. Vázquez, Ph.D.
Glenn Yamamoto

2003 Annual Report

Herbert M. Dwight, Jr., Chair
Jean F. Schulz, Vice Chair
Glenn Yamamoto, Secretary
Chris Dobson, Treasurer
Jeannette Anglin
Demaris Brinton
Dan Condrón
Paul Elliott
Barbara Graves
Judith L. Jordan
Harry Richardson, M.D.
Ernest Shelton
Paula Thomas
Neva Turer
Francisco H. Vázquez, Ph.D.
Henry Wendt

2004 Annual Report

Herbert M. Dwight, Jr., Chair
Jean F. Schulz, Vice Chair
Glenn Yamamoto, Secretary
Chris Dobson, Treasurer
Barbara Banke
Benny L. Bray
Demaris Brinton
Paul Elliott
Barbara Graves
Albert G. Handelman
Harry Richardson, M.D.
Ernest Shelton
Paula Thomas
Neva Turer
Francisco H. Vázquez, Ph.D.
David J. Voss

2005 Annual Report

Herbert M. Dwight, Jr., Chair
Glenn Yamamoto, Secretary
Chris Dobson, Treasurer
Barbara Banke
Benny L. Bray
Demaris Brinton
Mary Caldwell, R.N., Ph.D.
Barbara Graves
Albert G. Handelman
Lew Reid
Harry Richardson, M.D.
Jean F. Schulz
Francisco H. Vázquez, Ph.D.
David J. Voss
Joan C. Woodard

2006 Annual Report

Albert G. Handelman, Chair
Demaris Brinton, Vice Chair
David J. Voss, Secretary
Chris Dobson, Treasurer
Barbara Banke
Marcus Benedetti
Benny L. Bray
Mary Caldwell, R.N., Ph.D.
Herbert M. Dwight, Jr.
Theodore L. Eliot, Jr.
Barbara Graves
Lew Reid
Harry Richardson, M.D.
Jean F. Schulz, Director Emeritus
Wanda Tapia-Thomsen
Francisco H. Vázquez, Ph.D.
Joan C. Woodard
Glenn Yamamoto

2007 Annual Report

Barbara Graves, Chair
Albert G. Handelman, Secretary
Linda Kachiu, Treasurer

Charles J. Abbe
Barbara Banke
Benny L. Bray
Dianne Edwards
Theodore L. Eliot, Jr.
Pete Golis
Andrea Learned
Lew Reid
Harry Richardson, M.D.
Jean F. Schulz, Director Emeritus
Wanda Tapia-Thomsen
Francisco H. Vázquez, Ph.D.
David J. Voss
Cullen Williamson
Judith L. Withee
Joan C. Woodard

2008 Annual Report

David J. Voss, Chair
Barbara Graves, Secretary
Linda Kachiu, Treasurer
Charles J. Abbe
Tania Amochaev
Barbara Banke
Benny L. Bray
Herb Castillo
Harriet Derwingson
Dianne Edwards
Theodore L. Eliot, Jr.
Pete Golis
Whitney Hall
Albert G. Handelman
Andrea Learned
Lew Reid
Jean F. Schulz, Director Emeritus
Wanda Tapia-Thomsen
Cullen Williamson
Judith L. Withee
Joan C. Woodard, At Large

2009 Annual Report

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Herb Castillo, Secretary
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Tania Amochaev
Benny L. Bray
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Cullen Williamson
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Joan C. Woodard

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Steven M. Goldberg
Whitney Hall
Andrea Learned
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Lew Reid
Jean F. Schulz, Director Emeritus

Wanda Tapia-Thomsen
David J. Voss
Cullen Williamson
Judith L. Withee
Joan C. Woodard
Michelle Zygielbaum

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Marlene Soiland
Wanda Tapia-Thomsen
David J. Voss
Barry Weitzenberg
Judith L. Withee
Joan C. Woodard
Michelle Zygielbaum

Community Foundation Boards of Directors by Name*

| First Name | Last Name | Terms |
|---------------|-----------------------|--------------------------|
| Charles J. | Abbe | 2007 - 2012 |
| Tania | Amochaev | 2008 - 2010 |
| Edwin | Anderson, Jr. | 1983 - 1989 |
| Jeannette | Anglin | 1998 - 2003 |
| Ruben | Armiñana, Ph.D. | 1993 - 1998 |
| Peggy J. | Bair | 1990 - 1995 |
| Barbara | Banke | 2004 - 2008 |
| Les | Belden | 1990 - 1991 |
| Dan B. | Benedetti | 1996 - 2001 |
| Marcus | Benedetti | 2006 |
| John T. | Blount | 1992 - 1994 |
| Benny L. | Bray | 2004 - 2010 |
| Demaris | Brinton | 2003 - 2006 |
| F. James | Brock, Jr. | 1992 - 1997 |
| Jeanne M. | Buckley | 1994 - 2001 |
| Mary | Caldwell, R.N., Ph.D. | 2005 - 2006 |
| Loretta | Carr | 1996 - 2000 |
| Herb | Castillo | 2008 - 2012 |
| Lee | Chandler | 1989 - 1996 |
| Oscar | Chavez | 2009 - 2012 |
| Rev. James E. | Coffee | 1991 - 1993 |
| Mary T. | Colhoun | 2000 - 2002 |
| Frank | Collum | 1983 - 1986 |
| Harrison | Comstock | 1984 - 1990, 1992 |
| Dan | Condron | 1998 - 2003 |
| Patricia | Cordero | 1990 |
| Bradford J. | DeMeo | 1996 - 2001 |
| Harriet | Derwingson | 2008 - 2010 |
| Chris | Dobson | 2002 - 2006 |
| John | Doolittle | 1983 - 1991 |
| Herbert M. | Dwight, Jr. | 2000 - 2006 |
| Dianne | Edwards | 2007 - 2012 |
| Theodore L. | Eliot, Jr. | 2006 - 2012 |
| Paul | Elliott | 2003 - 2004 |
| Patrick | Emery | 2012 |
| Thomas J. | Farrell | 1990 - 1992 |
| Neil | Ferguson | 1983 - 1986 |
| Thomas C. | Freeman | 1988 - 1992 |
| Benny | Friedman | 1991 |
| Harry | Friedman | 1992 - 1998 |
| Peggy J. | Furth | 1993 - 1998 |
| Barbara D. | Gallagher | 1992 - 1997 |
| Steven | Goldberg | 2010 - 2012 |
| Pete | Golis | 2007 - 2012 |
| J. Barrie | Graham | 1985 - 1987, 1995 - 2001 |
| Barbara | Graves | 2002 - 2008 |
| Whitney | Hall | 2008 - 2012 |
| Albert G. | Handelman | 2004 - 2008 |
| Gary | Heck | 1988 |
| Nancy M. | Henshaw | 1986 - 1992 |
| Carla | Howell | 1994 - 1995 |

*The names and titles of directors and the dates of their terms were obtained from Community Foundation documents (for the years 1983–1991) and from Community Foundation annual reports (for the years 1992–2011).

| First Name | Last Name | Terms |
|--------------|------------------|--|
| Dorothe | Hutchinson | 1986 - 1991 |
| Richard J. | Indermill | 1990 - 1992 |
| Schuyler | Jeffries | 1984 - 1990 |
| Judith L. | Jordan | 1999 - 2003 |
| Linda | Kachiu | 2007 - 2012 |
| Robert | Kerr | 1983 - 1984 |
| Patrick | Kilkenny | 1994 - 1999 |
| Lucy | Kishaba | 1991 - 1996 |
| Arthur | Lafranchi | 1984 - 1990 |
| Claire | Lampson | 1991 - 1993 |
| Stanley | Lance | 1991 |
| Andrea | Learned | 2007 - 2012 |
| Susan | Lentz | 2012 |
| Louise | Levinger | 1983 - 1991 |
| Dan | Libarle | 1993 |
| Mark | Matthews | 1991 - 1995 |
| Olive | McWain (Kerr) | 1984 - 1990 |
| Deborah A. | Meekins | 1998 - 2001 |
| John | Moskowitz | 1983 - 1990 |
| Ambrose | Nichols | 1984 - 1990 |
| John R. | O'Brien | 1991 - 1996 |
| Thomas | Passalacqua | 1983 - 1984 |
| William | Pedersen | 1984 - 1986 |
| Peter | Piasecki | 1992 - 1995 |
| Edward | Pisenti | 1983 - 1989 |
| Rhoann | Ponseti | 1991 - 1998 |
| Steven | Rabinowitsh | 2009 - 2012 |
| Lew | Reid | 2005 - 2012 |
| C. William | Reinking | 1987 - 1992 |
| Dee | Richardson | 1990 - 1995 |
| Harry | Richardson, M.D. | 2003 - 2007 |
| John H. C. | Riley | 1984 - 1990 |
| Irwin S. | Rothenberg | 1993 - 1998 |
| Joshua | Rymer | 2012 |
| Al | Said | 1984 - 1985 |
| Jean F. | Schulz | 1983 - 1997, ex officio 1998 - 2001, 2002 - 2005, Director Emeritus 2006 - 2012 |
| John | Shanahan | 1986 - 1992 |
| Ernest | Shelton | 1999 - 2004 |
| Andrew | Shepard | 1983 - 1984 |
| Marlene | Soiland | 2012 |
| Carlos | Tamayo | 1997 - 1999 |
| Wanda | Tapia-Thomsen | 2006 - 2012 |
| Jack | Taylor | 1989 - 1993 |
| Martin | Teitel | 1996 |
| Paula | Thomas | 1999 - 2004 |
| Eugene | Traverso | 1984 - 1986 |
| Henry | Trione | 1983 - 1984 |
| Victor S. | Trione | 1987 - 1992 |
| Neva | Turer | 1999 - 2004 |
| Royce | Van Bebber | 1983 - 1986 |
| Francisco H. | Vázquez, Ph.D. | 2002 - 2007 |
| Kirk | Veale | 1988 - 1995 |
| Cathleen | Vicini | 1995 - 2000 |
| David | Viviani | 1983 - 1989 |
| David J. | Voss | 2004 - 2012 |

| <u>First Name</u> | <u>Last Name</u> | <u>Terms</u> |
|-------------------|------------------|--------------|
| Barbara | Walter | 1983 - 1990 |
| Thomas P. | Ward | 1992 - 1993 |
| Reuben | Weinzveg | 1996 - 2002 |
| Barry | Weitzenberg | 2012 |
| Mike | Welty | 1997 - 1999 |
| Henry | Wendt | 1998 - 2003 |
| Cullen | Williamson | 2007 - 2010 |
| Judith L. | Withee | 2007 - 2012 |
| Joan C. | Woodard | 2005 - 2012 |
| Paul | Wright | 1985 - 1986 |
| Glenn | Yamamoto | 2001 - 2006 |
| Michelle | Zygielbaum | 2010 - 2012 |

Appendix E

Grant and Scholarship History

The Foundation's goal is to ensure a permanent source of funds for local charities and nonprofit organizations. Grant strategies have evolved and changed through the years as the community and the community's needs have changed.

As of December 2012, the Foundation had awarded 11,287 grants and scholarships totaling \$128.5 million.

| Year | Amount* | Grants | Year | Amount* | Grants |
|------|---------------|--------|---------------|------------------------|---------------|
| 1984 | \$132,000 | 2 | 2000 | \$6.7 million | 474 |
| 1985 | \$4,000 | 4 | 2001 | \$9.3 million | 514 |
| 1986 | \$32,000 | 9 | 2002 | \$10.6 million | 553 |
| 1987 | \$75,000 | 4 | 2003 | \$4.5 million | 503 |
| 1988 | \$13,000 | 5 | 2004 | \$4.5 million | 660 |
| 1989 | \$378,000 | 96 | 2005 | \$6.4 million | 815 |
| 1990 | \$335,000 | 105 | 2006 | \$12.1 million | 867 |
| 1991 | \$197,000 | 78 | 2007 | \$12.0 million | 864 |
| 1992 | \$291,000 | 117 | 2008 | \$16.4 million | 844 |
| 1993 | \$452,000 | 166 | 2009 | \$8.2 million | 840 |
| 1994 | \$923,000 | 179 | 2010 | \$6.2 million | 914 |
| 1995 | \$1.0 million | 227 | 2011 | \$8.2 million | 878 |
| 1996 | \$1.9 million | 151 | 2012 | \$9.9 million | 780 |
| 1997 | \$2.6 million | 146 | | | |
| 1998 | \$2.2 million | 263 | TOTAL: | \$128.5 million | 11,287 |
| 1999 | \$3.0 million | 229 | | | |

*Grant figures were obtained from Foundation annual reports and other Foundation documents. Prior to 2000, grant figures included grants made to nonprofit organizations from funds the organizations had invested with the Community Foundation Sonoma County. Grants of nonprofit organization funds were made to the agencies upon request. After 2000, only grants from Community Foundation donors and discretionary funds were included.

Appendix F

The Santa Rosa Foundation

The Santa Rosa Foundation was in many ways the spiritual predecessor of Community Foundation Sonoma County. It was formed in 1932 to administer the bequest of railroad tycoon Leonard Howarth who died in 1930 leaving \$75,000 (the equivalent of \$1 million in today's dollars) to benefit the city of Santa Rosa.

Over a period of 50 years, the Santa Rosa Foundation was involved in the creation of two of the finest parks in Santa Rosa and the preservation of the Santa Rosa Post Office and its conversion into the Sonoma County Museum. It also managed bequests from private citizens, investing bequests and administering grants and scholarships.

Judge Hilliard Comstock, a respected and civic-minded jurist, was president of the board when the Foundation purchased vacant land on South A Street and created what is now Burbank Park, with playground equipment for youngsters, tennis courts and a baseball diamond. The rest of Howarth's bequest was invested for future use.

In 1948, the state Department of Transportation condemned a portion of the park for construction of Highway 101. Judge Comstock's well-honed negotiating skills led to an agreement in which the Department agreed to exchange a 152-acre parcel it owned on Summerfield Road for the portion it needed of the A Street land.

The Foundation board recognized that the new acreage, which included Lake Ralphine, had enormous potential for a community park, and proceeded to purchase an adjacent property, the McCrea Ranch.

A few years later, when the county sought the McCrea Ranch property for a flood control lake, Judge Comstock negotiated another favorable deal. "There was some more arm-twisting, and we had enough money to pay for all the improvements at what is now Howarth Park," said Harrison Comstock, the son of Judge Comstock and later president of the Santa Rosa Foundation.

Created in 1959, Howarth Park remains a major recreational area and one of the jewels of the Santa Rosa city park system. After acquiring the McCrea Ranch property, the county constructed a flood protection reservoir—now called Spring Lake—and in 1974 developed the land surrounding the lake into what is now known as Spring Lake Park.

Another major bequest came to the Santa Rosa Foundation in 1975, a gift of \$100,000 from Jessie and Fred Rosenberg, owners of the Rosenberg's Department Store in downtown Santa Rosa.

Through the years, the Foundation also managed funds set aside for specific purposes by a variety of donors:

- Oversaw \$400,000 in public donations that helped build Santa Rosa Memorial Hospital in 1950.
- Served as trustee for the George M. Firestone Memorial Fund, which annually sponsored a Santa Rosa lecture by a noted medical authority.
- Made loans and grants to deserving students as designated in the DeForest Hamilton Trust Fund.
- Served as trustee for the Fred S. and Jessie R. Rosenberg Scholarship Fund, a source of student loans and grants.

- Administered the Richard T. Torkelson Memorial Journalism Scholarship Fund, a \$250 annual scholarship to journalism students.

Santa Rosa Foundation board members watched as the Community Foundation formed in 1983, and in 1984 made a decision to merge with the new Foundation. There wasn't room in the community for two foundations, and the Community Foundation name encompassed a broader vision, Comstock said.

After the merger, Comstock, an attorney, became a member of the Community Foundation Board of Directors and served until 1992. Several other Santa Rosa Foundation board members also served on the new board, including attorney Ed Anderson, who became the Community Foundation's first president.

Appendix G

The Parent Education Project

In 1987, the Foundation launched its first major project—a series of classes focused on improving parent-teen communication with the goal of lowering the rate of teen substance abuse and school drop-out.

Louise Levinger, a founding board member, suggested the Foundation do something for youth. The board followed up by creating a community advisory group that included executives from nonprofits, county program administrators and a juvenile court judge, among others.

The result was the Parent Education Project, which offered free classes over the lunch hour to working parents on such issues as improving communication, building self-esteem for parents and children, instilling responsibility in children and family problem solving.

Lynn Lott, an author, teacher and consultant in parent education, provided parent educators to lead the classes. Janet Bankovich, who had been on the program staff at the San Francisco Foundation, was hired as project coordinator.

The classes were held once a week for four to six weeks. Parents would talk about one of the topics during the class, and learn strategies they could take home and practice during the week. The following week they would share with the other participants what worked and what didn't, becoming their own teachers.

“The whole concept of parent education was kind of new. Parents didn't want to think they didn't know how to raise their kids, so we had to call the classes something else—parenting seminars,” Bankovich said.

Initially, five organizations opened their doors for the project: the Sonoma County Medical Association, Santa Rosa Memorial Hospital, Hewlett-Packard, the Sonoma Developmental Center, and IMCO Realty Services.

Business leaders involved in the program, primarily human resource directors, soon saw the value of the parenting classes. They formed their own group, the Business Leaders Forum on Childcare, which met monthly and offered annual awards to companies that implemented parent education or other child-related programs.

By the end of the first year, nearly 400 parents had attended classes. The Foundation also pulled together a list of family-oriented community organizations and other resources, which it distributed to an additional 1,000 parents.

“It was a huge outreach,” Bankovich said. “I really felt we had helped kids have better lives. Parents were learning something, and human relations people at the businesses were learning how to help their employees. It also raised the Foundation's visibility tremendously.”

The project was extremely well-received, and the Foundation decided to expand the program.

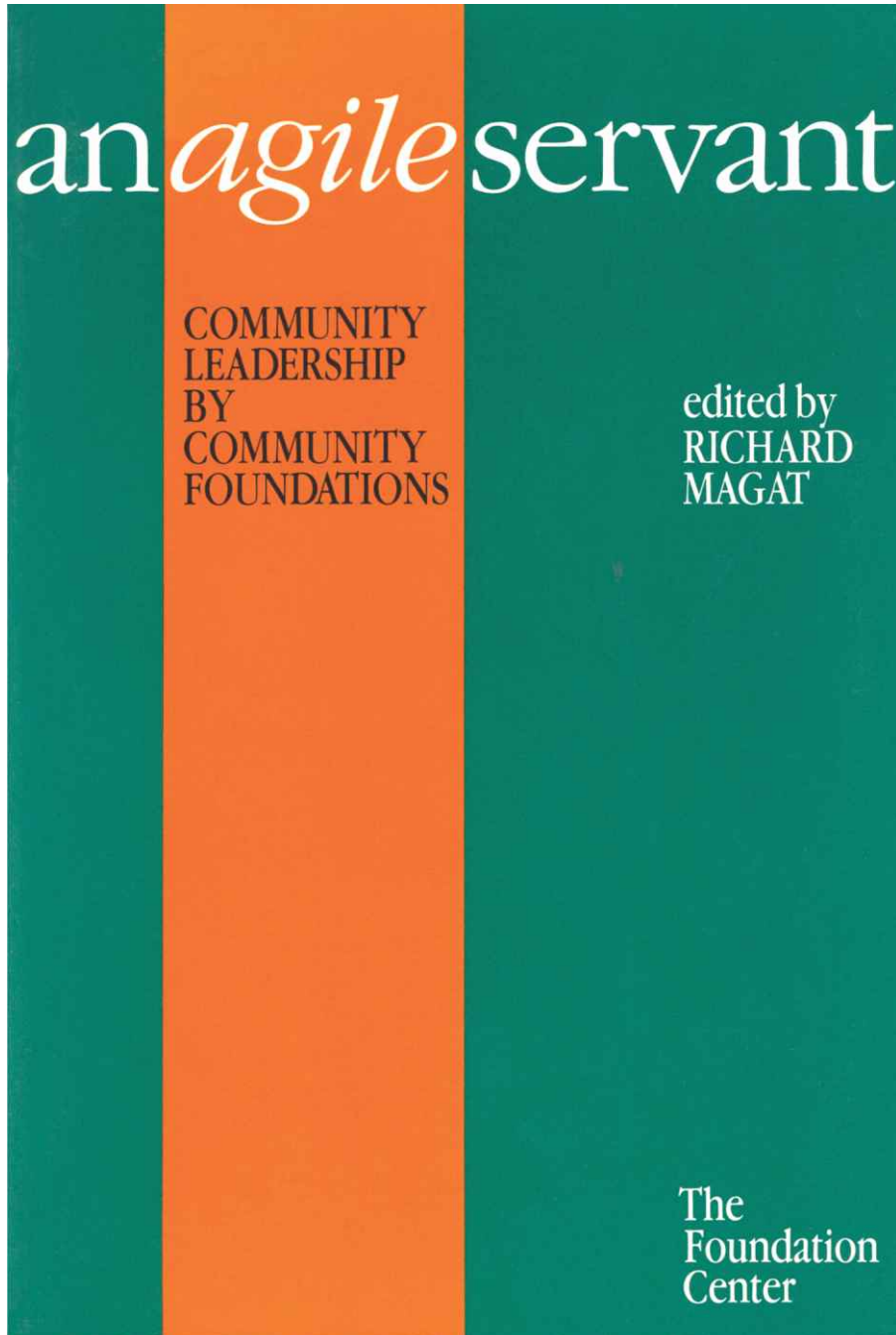
At the urging of Executive Director Virginia Hubbell, the James Irvine Foundation awarded the Foundation \$180,000 to “reach diverse and hard-to-reach populations throughout Sonoma County.”



Photo: Community Foundation

A Latino parent advisory group was created, and an additional 100 parent educators were trained. The Foundation provided mini-grants to 43 organizations seeking to offer new or expanded parent education services. Project staff members spoke at conferences, hosted information tables at community events, gave radio interviews and appeared in public service television spots.

*An Agile Servant,
a National Report on the Parent Education Project*



A full-size version of the reprint of *An Agile Servant* is available online for download at SonomaCF.org.

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an agile servant

COMMUNITY LEADERSHIP BY
COMMUNITY FOUNDATIONS

edited by
RICHARD
MAGAT

Produced by
The National Agenda
for
Community Foundations'
Community Leadership Project
of the
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The Foundation Center

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Sonoma: Visibility Through Action

Wendy Ellyn

THE CHALLENGE

In March 1987 the fledgling Sonoma County Foundation had just \$350,000 in assets, no grantmaking program, and zero visibility. Executive director Virginia Hubbell and a half-time secretary worked out of a donated office in downtown Santa Rosa, California. The foundation's goal was to build a \$5-million endowment by 1992.

To establish the foundation's identity in the community and to build credibility among both grantseekers and prospective donors, Hubbell, who had been hired six months earlier, asked her board of trustees to sponsor and operate a project to address a key community need. Developing such a project, Hubbell told her board, would help to demonstrate the foundation's strengths as a catalyst for problem-solving and a convener of community resources. That, in turn, would help it raise funds.

For the most part, the board was enthusiastic about the idea. However, some trustees feared that, by operating a project, the foundation would alienate local agencies. To avoid setting itself up as a competitor for precious community funds, the board decided that the foundation should tap new funding sources to initiate a project, and

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should involve existing community agencies in the project's ownership and long-term operation.

With these goals in mind, the board directed its needs committee to identify an appropriate project targeted at youth-related issues. Discussions with local educators and social service agency directors helped the committee determine that the most effective strategy in preventing a broad range of problems among young people in Sonoma County would be a project focused on family support and parent education.

By December 1988, a Parent Education Project had accomplished all of the foundation's goals and more. Sonoma County Foundation had increased its assets to \$1.1 million, including nearly \$210,000 in contributions to help fund the project. Publicity spawned by the project had catapulted the foundation into the public eye and generated cooperation and recognition from local businesses and social service agencies. The project had demonstrated that the foundation could produce tangible, positive results on a key community issue.

"We succeeded in identifying a real community need, bringing together a diverse group of organizations and community resources to help solve it, and pulling in new sources of funding from outside the county," Hubbell said. "Now we're working to spin the project off to the community. Through this project, we've given the community one concrete answer to the question, 'What is this thing called a community foundation?'"

THE PARENT EDUCATION PROJECT

Perhaps the most distinctive element of the project was that it gave businesses the opportunity to offer family education to their employees by bringing trained parent educators directly into the workplace. The parent educators presented one-hour classes for working parents during lunch or shift breaks, once a week for four to six weeks. Classes covered such topics as balancing work and family life, improving communication, building self-esteem for parents and children, instilling responsibility in children, and family problem-solving.

Both male and female employees from all levels attended: managers, engineers, clerical staff, production workers. Classes were offered free to employees, but at several sites parents were so appreciative that they contributed up to \$25 each for the course. At some work sites, classes were held entirely on the employee's own time; at others, classes were split over paid and non-paid time. By the end of its pilot year, the Parent Education Project had served nearly 400 parents and

provided about 1,000 additional employees with a list of nonprofit agencies that help families. Numerous community agencies and the Sonoma County Board of Education distributed copies of the list to interested parents and community leaders.

One mother said that the classes helped her to share child-rearing experiences and feel more solidarity with co-workers, while learning to communicate more effectively. Another said she learned “what our parents perhaps didn’t realize—that self-esteem is the most important thing to teach our children.”

The project also received high marks from employers:

“Family disorder is the number one problem that interferes with work,” said Jeanne Ganas, vice-president of human resources at Sonoma County Medical Association, where most employees work as claims processors. “Projects like this help us chip away at long-standing turnover dilemma. The work climate improves when employees know management is not oblivious to their lives away from this place.”

Seven mid-sized and large employers in the county’s four largest communities participated during the project’s first year. Pilot programs were held at Sonoma County Medical Association, Santa Rosa Memorial Hospital, and Hewlett-Packard, all in Santa Rosa; and at Sonoma Developmental Center, a state hospital in Sonoma. A second round of classes was given at the medical association and IMCO Realty Services in Santa Rosa, Sola Optical in Petaluma, and Hewlett-Packard in Rohnert Park.

The project’s success encouraged the foundation to expand it to other locations. A \$5,000 grant from Pacific Bell enabled the foundation to develop a pilot work-site program to reach monolingual Spanish-speaking parents, a growing part of Sonoma County’s population. In addition, the foundation received a \$180,000 grant from the James Irvine Foundation for expansion and for training staff of local agencies to teach parenting skills.

The project also became the springboard for the foundation’s involvement in other efforts to promote the health of families. Public television Channel 22 asked the foundation to convene a forum of business leaders to participate in a national teleconference on employers and child care; 11 major Sonoma County employers participated. Findings from this forum were presented by the foundation at a regional conference for child care providers at Sonoma State University. This group continued meeting to discuss child care issues, and along with the foundation, co-sponsored a day-long symposium on child care options that was attended by more than 100 local executives and human resource

managers. It was the first such gathering of business leaders devoted to child care issues in the county.

WHY PARENT EDUCATION?

Parent education in Sonoma County has a long history. However, accessible, large-scale parent training in the workplace is new.

Since the mid-1970s, parenting classes and support groups in Sonoma County have been offered, primarily through three agencies. Together, they served about 3,000 families in 1988—3 percent of the nearly 100,000 families in the county.

These agencies have been the most successful providers of parent education. Other groups, including churches, nonprofits, and public agencies, offer education and support for families; however, their classes are often underfunded, access is often difficult for parents, and attendance fluctuates greatly.

In recent years, decreased government funds for health and human services, and rapid, heterogeneous population growth have swelled the need for additional efforts to help families in Sonoma County.

The county covers some 1,600 square miles; Santa Rosa, population 109,000, is its major city and its financial center. Since 1980, the county's population has grown by about 20 percent to nearly 350,000. Most growth has occurred in Santa Rosa, Petaluma, and Rohnert Park, which form a metropolitan corridor along Highway 101, the main route from San Francisco, 50 miles to the south.

Private sector employment has shifted dramatically in the last decade, from a predominantly agricultural economy to one dominated by service, retail, and manufacturing. Newcomers include workers relocating to take advantage of the area's boom in these industries, immigrants seeking seasonal agricultural work, and new families seeking alternatives to skyrocketing housing costs in the Bay Area counties of Marin, Alameda, and San Francisco. Often both parents work. Many commute to work from new bedroom communities that lack well-established neighborhoods, many are single parents, and many do not live near extended families.

Through the workplace-based program, Sonoma County Foundation was able to bring together the business and social service communities to provide a much-needed addition to existing family support services. By integrating the Parent Education Project into a variety of sizes and types of businesses, the foundation offered parent education to a cross section of the community not typically served by existing agencies. Because the classes were offered free and at times

convenient for working parents, they attracted many parents who might not spend time or money to improve their parenting skills: parents in two-worker families, single parents, and low-income parents.

THE FOUNDATION'S ADVANTAGE

Previous attempts at workplace-based parent education had faltered for several reasons. Corporations were reluctant to endorse one parenting philosophy to employees above all others. In some cases, agencies failed to tailor programs to the company's circumstances. The Sonoma County Foundation project succeeded largely because of such advantages as the support and direct involvement of the foundation's board of directors, an executive director skilled at fundraising and project development, a project coordinator, and the foundation's standing as a neutral agency.

The foundation was launched in 1983 by community and business leaders who were concerned about the shortage of government funding for human services. By 1986, the trustees decided that the Sonoma County Foundation could become truly effective only under the guidance of a full-time executive director. After several unsuccessful attempts to secure grants, the trustees donated money to pay a director's salary for one year.

Today, the foundation has a 20-member board that includes prominent business owners and managers, bankers, educators, and attorneys. President of the board, Jean Forsyth Schulz, is a director of several local nonprofit organizations (see page 109); several trustees are leaders in local educational, volunteer, and political organizations. Executive director Hubbell is experienced in fundraising and nonprofit management, having worked for many years as a consultant to corporations, nonprofits, and foundations.

The board's support was critical in getting the Parent Education Project under way. Several board members worked to involve local businesses. Two board members donated a total of \$15,000 for the project. These funds, plus \$15,000 from McKesson, allowed the foundation to hire a part-time project coordinator, Janet Bankovich. A former program associate in urban affairs at the San Francisco Foundation, Bankovich worked as a liaison between social service leaders, the foundation, and business.

In addition, the foundation's position as a neutral agency helped it convene a diverse group of community leaders to design the project. The foundation invited several agency leaders to sit on a nine-member advisory board with foundation trustees and a representative of the

business community. Several were from social service agencies that compete for funding.

“This group had the potential to be especially political and partisan,” said Phyllis Kirk, an advisory board member and founder of a parent support group in Sonoma. “But Virginia and Janet prevented that by keeping us focused. They galvanized everyone around a common goal.”

While the foundation’s board members originally feared that taking an operating role would alienate the very agencies the foundation hoped to work with, the opposite proved true. The foundation received only one complaint challenging its operating role. As the project grew, agency leaders came to view the foundation as an effective, dedicated ally in the human service community.

Some leaders likely believed that their participation in the Parent Education Project would ensure favorable consideration should their agency ever apply for a foundation grant. But there was more at work here than self-interest. The foundation was in a position to pave the way for a new alliance between the business and social service communities, and many leaders recognized that.

“I appreciated that the foundation went after sanction and funding from the business community, which has not traditionally been a resource for supporting families,” said Marjorie Helm, a member of the advisory board and division manager of youth services for Sonoma County Mental Health. Others understood that the foundation was able to do what a single agency could not: raise significant funds to support parent education, and secure grants from foundations that had never before funded in Sonoma County.

HOW THE PROJECT GREW

The advisory board reviewed a number of other parent education models from around the country, but ultimately designed a hybrid version that made use of qualified local parent educators and fit the needs of Sonoma County businesses.

Hubbell and Louise Levinger, a foundation trustee and advisory board member, invited a variety of businesses of different sizes, types, and locations to discuss the project. A handful said the project wouldn’t work for them, either because of their shift schedules or because of small staff size. Several nonunionized companies also voiced concerns that the classes not become a forum for organizing. But a majority expressed interest. These meetings gave businesses a sense of involvement and responsibility for the project.

The business meetings led Bankovich to design a sheet of guidelines, advising managers to schedule the classes in the same room, on the same day of the week, and at the same time each day; to obtain approval from mid-level managers for each department; and to publicize the classes well in advance. She also created publicity materials and met with managers at their sites to discuss logistics.

"The foundation respected that we're running a business, and that our primary purpose is to make a profit," said Mike Ronstadt, manager of training and health services at Hewlett-Packard in Santa Rosa. "Janet made it very clear that the foundation was willing to work within our structure—to use our methods of publicizing events, and to make sure the classes fit in with our work schedules."

Through a bidding process, two Sonoma County parent educators were selected to conduct pilot programs over two months: Summerfield Counseling and Peter Krohn. Both work according to a similar model, which teaches parents to promote self-esteem and to encourage children's responsible behavior not through rewards and punishments, but through helping children to recognize the consequences of their actions. Summerfield's trainers featured more class involvement and role-playing; Krohn, more lecture and discussion.

The pilot sites included a variety of businesses. Hewlett-Packard, an electronics firm, had about 2,200 employees. Sonoma County Medical Association, a claims-processing business, had 200, mostly women in their 20s. Santa Rosa Memorial Hospital had 1,100; Sonoma Developmental Center, a state hospital for the developmentally disabled, 1,300, including many single parents of below-average income.

RESULTS

Pilot classes were well attended at Hewlett-Packard and the medical association. However, only two classes were held at Santa Rosa Memorial Hospital, largely because the hospital was in the midst of staff layoffs, and because it became difficult to find one room to use regularly for classes. At Sonoma Developmental Center, flyers and other publicity materials were not ready far enough in advance to reach a significant number of employees. For this reason, and because approvals were not secured from many mid-level managers, only about 15 employees attended each of four sessions.

Nevertheless, evaluations of the classes from those who did attend were very positive. Many parents reported immediate results at home, and said the techniques and insights they gained helped them arrive at work feeling less stressed. Parents were willing to offer constructive

feedback as well. At one site, though, some parents found the wide-open nature of the discussion sessions intimidating, and suggested that class leaders ask for anonymous written suggestions of topics or problems for discussion. Others suggested that workshops feature longer classes or more class meetings as well as classes tailored to parents of specific age groups. Many parents requested ongoing support groups once the classes ended.

In January 1988, the foundation's board agreed to fund the project for an additional year, and directed Hubbell and Bankovich to begin searching for funding. Work began on a second round of classes at four firms.

MOVING BEYOND THE WORKPLACE

In addition to parent education classes in the workplace, the foundation also hoped to foster the emergence of parent leaders to link with other groups, empower parents to lead support groups, and spread parent education to other sites.

After working with leaders in the nonprofit community, including a committee of leaders of agencies that serve Hispanics, Hubbell and Bankovich wrote a comprehensive proposal for expanding the program. The foundation received a \$180,000 grant from the James Irvine Foundation. Tom David, grant officer at the Irvine Foundation, said the foundation's proposal was funded because it "demonstrates a foundation's community collaboration, capacity building and convening functions, addresses children's issues, includes services for parents of color, and meets needs outside a major metropolitan area—all of which are high priorities of the Irvine Foundation."

The project will expand along "train the trainers" lines. Three groups in the parent training field will train staff from health and human service agencies to teach parent education classes and to lead parent support groups. To sensitize these parent educators to the special needs and styles of the populations being served, a parent or individual from each group will be paired with the parent educator.

The ambitious program will serve Hispanics, Southeast Asian refugees, Eritrean and Ethiopian refugees, Native Americans, and blacks; teachers and staff of public and nonprofit organizations that serve children, librarians who work with latch-key children; and such special groups as adoptive parents, homeless parents, parents who are prisoners or in half-way houses, parents involved in the Greater Avenues to Independence (GAIN) and Aid to Families with Dependent Children (AFDC) programs, abusive parents, parents who were abused

as children, parents of dropouts, teen parents, and parents of teen parents.

In the meantime, the foundation is strengthening the workplace-based program. It hopes to create a marketing package to expand the number of employers reached, and to train parents who have participated to lead independent workplace-based parent support groups.

BUILDING A COALITION FOR THE FUTURE

Sonoma County Foundation would not operate the worksite project indefinitely, even if more funds and staff were available. The foundation's intent was to strengthen existing programs and agencies by initiating a project that these agencies felt was important, and in which they could participate jointly.

"Our board was naturally quite pleased that the foundation's role as advocate and umbrella was seen as the key to this project," says board president Jean Schulz. "But this project does not only belong to the foundation. From the beginning, we made it a priority to involve diverse agencies, and to make this a genuinely cooperative endeavor."

Thus, the foundation is in the process of handing the project over to an advisory board comprised of agency and community leaders who will direct it long after the foundation's initial financial commitment ends. Foundation trustees have not guaranteed full financial support or administrative assistance, but they may consider making limited grants to the project. Most future funding is expected to come from such sources as fees for services and grants from foundations, businesses, the county, and other agencies.

According to Hubbell and Bankovich, initial discussions indicate that creating this advisory board may be more difficult—and political—than the foundation envisioned. The foundation's success at gaining grants for the project has proved to be a double-edged sword: while it ensures funds for the project's expansion, it also attracts some agencies that may be less interested in promoting parent education than in associating with the foundation in the hope that some of its prestige—and funding—will rub off on them.

Whether agency leaders can work together effectively over the long run is another concern. Organizations in the social service community are fierce competitors for precarious public and private funding. While many agency leaders were able to put their differences aside to work on the Parent Education Project, cooperating on a long-term program without the foundation's neutralizing leadership may prove

more difficult. To overcome such obstacles the foundation is working to create a broader based advisory board and three subcommittees, which will determine the fate of the Parent Education Project.

Whatever the project's future may be, it has had positive and widespread results. Hundreds of parents have been helped to see themselves and their children in a new, more positive light. To businesses and the county at large, the project publicized the need to support parents in the task of raising the next generation. It helped forge new alliances between businesses and social service agencies. And, in a short time, it demonstrated the practical role a community foundation can play in tackling a critical community problem and in attracting new and otherwise unavailable funds to the community.

In Hubbell's words, "Yes, this program was controversial, and yes, it took a lot of daring and hard work. But it brought home an important fact to a lot of people—that community foundations are different, and can dream as big as they want to dream."

Anatomy of a Bequest

One of the largest charitable gifts in Sonoma County history came in 2009, when longtime Sonoma Valley residents Hazel and Roland Todd left an \$8.5 million bequest to the Community Foundation. It was the second-largest bequest the Foundation has ever received.

For many in the community, the generous gift seemed to come out of the blue—a miracle of some kind or a windfall that “just happened.”

But very few donations really come out of nowhere with no work on the part of the organization. Donors have a way of watching quietly, sometimes for years, before making a major donation or bequest. They are looking for an organization they can trust to manage their money and meet their philanthropic wishes—one that has gained a reputation for respecting donors’ wishes and making a difference in the community.

Kay Marquet, then the Foundation’s president and CEO, had been working with the Todds for nearly a decade before the “windfall” bequest appeared.

She first met with the Todds in the mid-1990s. Bill Utsinger, a trust officer at Exchange Bank where the Todds were customers, knew the couple had no children or close family members and would want to leave their money to benefit the community. He thought the Foundation might be a good fit, and asked Marquet to talk to them about the organization’s abilities and goals.

Then, in about 2000, Marquet met with the Todds again, this time at the request of their trust attorney, Tom Haeuser. The couple was now ready to make long-term plans for the use of their money.

One of their first decisions was to sell 20 acres of land and, working with Marquet, to donate most of the proceeds to charitable causes.

Roland Todd, a retired diesel engine distributor, knew the value of good equipment and the life-saving role fire departments played as first responders in the rural Sonoma Valley. So \$900,000 from the land sale went to replace aging fire equipment at the three Sonoma Valley fire departments—Kenwood, Schell-Vista and Glen Ellen.

The Glen Ellen Fire Department used its \$300,000 share, together with careful budgeting and about \$175,000 raised by its Firefighters Association, to buy three much-needed fire vehicles: a fire engine, an emergency rescue vehicle equipped with medical equipment and the Jaws of Life, and a water tender capable of carrying 2,000 gallons of water.

The Todds’ donation was a godsend, said Bill Murray, then Glen Ellen fire chief. “It helped us so much. All our apparatus at that time was junk. It was so old we couldn’t get parts for it,” he said.

The fire engine, which was custom designed to fight both structure and wildland fires, was named Hazel T in honor of Hazel Todd. “After that, every time we got a piece of equipment, we took Roland and Hazel for the first ride,” Murray said.

The Todds also made a significant donation to FISH (Friends in Sonoma Helping), a nonprofit that provides immediate emergency assistance to families on the brink of homelessness or going hungry.



The Todds’ fire engine gift
Photo: Community Foundation

As time went on, Marquet suggested ways the Todds could use the Foundation to fund programs that were important to them and would meet their desires to benefit Sonoma Valley residents. The Todds' attorney at one point also let her know that the couple would be leaving a major bequest to the Foundation.

“It’s important to spend time with people, to give them time to know you personally and to become comfortable with trusting their money to the Foundation. It often takes years,” Marquet said.

The relationship deepened into an affectionate and respectful friendship that continued even after the Todds moved to a senior housing complex in Sonoma and during times they spent in the hospital and at a nursing home. Conversation flowed easily, from the latest Glen Ellen happenings to spring flowers to anecdotes about life in the senior complex.

“The people part of my job was a true pleasure,” Marquet said. “Yes, visiting the Todds was part of my job, but it was a joy to be with them. Hazel Todd was a very special person, always upbeat and always interested and full of questions. I miss her.”

When it was finally adjudicated in 2011, the Hazel and Roland Todd Trust left \$8.5 million primarily to benefit the health and well-being of residents of Sonoma Valley through services such as health care, adult education and employment training. The Todds also requested that some of the funds be used for land and trail acquisition.

Because the Todds expressed their generosity through a Community Foundation endowment, the causes they held dear will receive about \$350,000 a year forever. In 2012 alone, money from their trust funded the purchase of a mobile dental van, an emergency rental assistance program and the creation of community gardens.

“The Todds clearly wanted to provide something important and meaningful with their bequest that would positively impact the lives of people living in the Sonoma Valley for years into the future,” Marquet said.

Advancing the Arts

National funding organizations had begun to recognize and respect Community Foundation Sonoma County. The James Irvine Foundation was one of those, and in 2004 invited the Community Foundation, and a few other selected foundations nationwide, to apply for a grant to advance the arts in their communities.

Marquet urged the board to accept the challenge, pointing out that the arts can serve an important role in community building as well as being valuable in their own right. She reminded the board that the current Arts Endowment Fund was created as the result of a Challenge Grant from the National Endowment for the Arts in 1988.

The Foundation's subsequent proposal, based on discussions with local artists, countywide arts-related organizations and arts departments at Sonoma State University and Santa Rosa Junior College, was successful. In late 2004 the Irvine Foundation awarded the Community Foundation \$400,000 to be paid out over three years.

Melissa Kester, who had a background in video, film and TV writing and a Ph.D. in psychology, was hired in April 2005 to oversee the administration of the grant and conduct supplemental fundraising. A partnership quickly developed between the Foundation and the Arts Council of Sonoma County, then chaired by Michael Friedenberg.

"We weren't arts people, and we needed to have a home for these programs after the grant period was over. The Arts Council was the natural place," Kester said.

Over a three-year period, the Foundation created the Sonoma County Artist Awards program, the first annual, recognized and juried awards program in the county, and, in partnership with Sonoma State University, produced an educational lecture series to help artists better manage the business side of their careers.

Perhaps most important of all, the Foundation used its convening skills to bring artists together from around the county to organize and coordinate two major arts festivals, Sculpture Sonoma and Performance Sonoma. "Something magical happens when you bring people with a common interest together around a shared goal," Jean Schulz said.

Sculpture Sonoma in 2005 included a catalog of sculptors and sculpture exhibits, with tours available for a six-week period. Sculptures were displayed at a dozen different venues countywide, including the Cloverdale Plaza, the Finley Community Center in Santa Rosa, Paradise Ridge Winery, Santa Rosa Junior College Art Gallery, Sebastopol Center for the Arts, Sonoma State University Art Gallery, Charles Schulz Museum and the Arts Council of Sonoma County.

Performance Sonoma followed in 2007. Huge posters went up, listing all the performing arts groups in Sonoma County, from the Symphony to the smallest community theater.

The Performance Sonoma theme, "Crossing Borders," exceeded expectations. One of the highlights was a bilingual experimental theater presentation in Healdsburg about literally and emotionally crossing the border from Mexico to the United States.

"It was very, very moving," Kester said. "At the end of the performance, the cast asked the audience for their thoughts. A potential arts donor who had come with me to the theater stood up and said he remembered when he and his aunt crossed the border the first time. His aunt was wearing new white tennis shoes so she could run faster, but when they hid under some bushes, the Border Patrol saw her white shoes and caught them.

“That is the kind of stuff art can do. No one knew that our donor, who is legal now, had not started out legally. Now he is donating to that theater group,” she said.

Kester’s fundraising efforts brought in \$300,000 for the arts, which was used to start an endowment to support the Artist Awards program.

Based on this success, the Irvine Foundation invited the Community Foundation to apply for a second round of funding, and in 2008 awarded another \$500,000 over three years.

With this grant, the Foundation created a destination website for the arts, developed a permanent arts festival and expanded the Artist Awards program to include arts, music and literary art as well as visual art. In the first two years, 15 artists received juried awards of \$5,000 each.

The Foundation also used its ability to convene people of similar interests around a common goal to facilitate the creation of a Santa Rosa Arts District on A Street. Not only did the city approve the project, it also approved a one percent levy on new development to help support it.

“We were at the forefront with fantastic people like Vicki Kumpfer from the city of Santa Rosa. We lobbied the City Council, and we brought people to the table to talk about the importance of the arts,” Kester said.

The Foundation’s accomplishments in advancing the arts in Sonoma County were later showcased at an Irvine Foundation conference in Los Angeles.

“The whole landscape of collaboration in the Sonoma County arts world has changed as a result of the Irvine grants and the Foundation’s partnership with the Arts Council,” Kester said.

Appendix K

The Foundation Logo

In 1988, board members realized that they needed to create a brochure to help raise public awareness of the Community Foundation’s vision and goals. So the Communications Committee began looking around for someone who had strong graphic design skills—and was willing to work on a very tight budget.

David Viviani, one of the founding board members, suggested they approach Doug Offenbacher, whose advertising agency was creating new packaging designs for the Viviani family’s Sonoma Cheese Factory.

Offenbacher offered to donate his time and services. “It was an honor to do it,” Offenbacher said. “All my work was commercial—fun, but very temporary. This was something of substance, something real that was meant to last.”

He began to put together what would become the Foundation’s first brochure, using photographs taken by local photographers Peeter Vilms and Faith Echtermeyer and text written by Wendy Ellyn.

“It was obvious we needed a symbol,” Offenbacher said, “a graphic that somehow represented strength, but in a caring way. I was staring out the window of my office, at a huge oak tree, looking for something inspiring. Then it came together. It had to be a tree shape—strong, growing, spreading, sheltering.”

He chose the shape of a spreading oak. “I divided it into four sections to represent the four service areas—arts, environment, education and human services,” Offenbacher said. Foundation board members, delighted at the design, adopted it in 1989.

“I love that logo,” said Kay Marquet, CEO of the Community Foundation from 1992 to 2009. “Doug looked at our four focus areas, and had them small at the bottom and fanning out as they grew. It was very symbolic, and it wasn’t the usual acorn or a bunch of people holding hands.”

Ten years earlier, newly settled in Santa Rosa, Offenbacher had also created the distinctive symbol for Santa Rosa Junior College. “Those are the two real highlights of all I’ve done since coming to Sonoma County,” he said.



Appendix L

Mission Statements

1983

The mission of the Sonoma County Community Foundation is to provide, in perpetuity, for the enrichment of the quality of life in Sonoma County by: encouraging philanthropy throughout the community; providing a service and vehicle for donors with varied interests and at various levels of giving; assessing and responding to emerging and changing community needs and opportunities; serving as a resource and catalyst for charitable activities; developing a permanent endowment for the community.

1995

The mission of Community Foundation Sonoma County—Matching philanthropic interests with community needs by: Serving as a leader, resource and catalyst to enrich the quality of life; developing a permanent endowment; encouraging philanthropy at all levels; providing comprehensive donor services; responding to changing community needs and opportunities.

2006

The mission of Community Foundation Sonoma County is to strengthen our local communities through effective philanthropy and civic engagement.

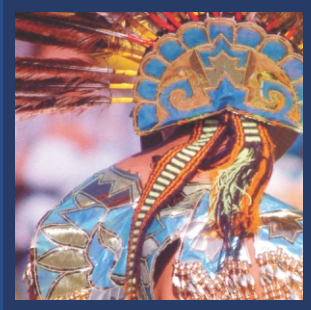
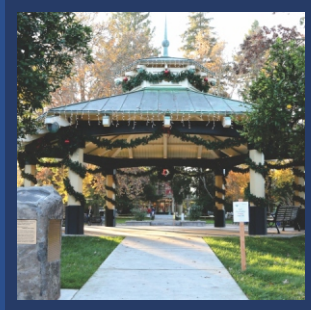
2012

At Community Foundation Sonoma County we connect people, ideas and resources to benefit the lives of those who live here.

The year was 1983, and the nation was reeling from what was then the worst recession since the Great Depression. As the economy worsened, the Reagan administration enacted sweeping tax cuts and massive reductions in social services.

In Santa Rosa, California, a group of community-minded individuals concerned about the city's quality of life began looking for another way to maintain human services, support new programs and serve other community needs, such as the arts and the environment.

This is their story—a history of the **Community Foundation Sonoma County** and its struggles and successes in bringing a richer quality of life to residents of Sonoma County.



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