



George Somero and Amy Anderson with Luka

partners IN PHILANTHROPY

The Community Foundation for Monterey County seeks to promote and inspire philanthropy throughout our region. It's through the generosity of our contributors and fund holders that we are able to make grants that impact our community for the better.

Amy Anderson, long time board president of Chamber Music Monterey Bay, and her husband, George Somero, current board chair of the Big Sur Land Trust, have recently partnered with the Community Foundation by opening a donor advised fund. And they plan to add to their fund

through an estate gift. Communications Officer Amanda Holder spoke with them about their charitable giving.

What prompted you to open a donor advised fund?

George—First, we felt it would be nice to start distributing funds in the near future rather than have these gifts be made after our deaths. We wanted to have the satisfaction of seeing some of our giving goals realized while we were around to see good things happen.

Second, we decided to focus our giving more locally, supporting organizations where gifts of the size we could provide would make a measurable difference to the causes we feel so strongly about.

Lastly, we were familiar with the Community Foundation's mission and their generosity to local nonprofits. We felt our assets would be in very good hands.

Amy—The current state of the economy focused our thoughts on our giving. As board members of nonprofits, we both saw how donations and earnings had declined. There was a more pronounced need and we wanted to have a stronger focused impact. We knew there were so many wonderful things that could be done.

Why did you choose the Community Foundation?

Amy—We've both been aware of how well managed the Community Foundation is. It's consistent and successful in investments and we've seen what they do for the nonprofit community.

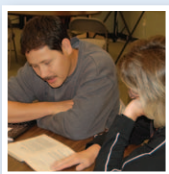
What areas of giving are you most interested in?

Amy—We concentrate on music and the arts, conservation, education, and social services, particularly women's rights.

We asked ourselves "Who would we want making those decisions when we're gone?" The Community Foundation will use the assets we contributed to continue the work we've chosen to support.

In this Issue

- 2 President's Message
- 3 Community Engagement
- 4 Grantmaking Impact
- 6 Leadership
- 7 Nonprofit Excellence



Literacy program at work—see page 6.

Agencies Focus on Mission While Building Assets Through Stewardship Funds

One significant way the Community Foundation can support nonprofits is by managing and growing an agency's endowed and/or reserve assets through stewardship funds. Agencies can focus on their core business and fulfill their mission while the Foundation handles all of the administrative details. Agencies with stewardship funds here can join in



S.T.A.R. Foundation board president Fritz Renner and Reg Huston present check to Dan Baldwin (center) to open Stewardship Fund

the Foundation's investment pool, offer their supporters the ability to accept complex gifts and receive consultation from our resource development team.

In addition to the S.T.A.R. Foundation of Monterey County and the Del Monte Forest Foundation, Chamber Music Monterey Bay is the latest to open a stewardship fund.

"Opening the Stewardship Fund allows our small board to focus on audience development, fundraising, and furthering our mission,"

—AMY ANDERSON

According to Amy Anderson, board president of Chamber Music Monterey Bay, their board unanimously supported opening their fund because of the Foundation's excellent investment record, stewardship and staff support. The flexibility of the fund was also a key feature, allowing the agency to access funds as they are needed.

"Board membership and expertise changes over time. Our job is to support this organization, and diminishing the burdens of the directors helps us do that," said Anderson.

president's message



Photo by Richard Green

Dan Baldwin, President/CEO

The blur that was 2010 just left the building. More than just quick, it was a year of significant transition. The temptation is to look back, but the work at the Community Foundation is all about looking ahead. (One exception — we can't let 2010 pass without again acknowledging Todd Lueders' 29-year tenure as founding CEO and the work that has led us to this point.)

The word for 2011 will be "transformational."

On December 2, the board of directors approved a new strategic plan, the content of which will be highlighted in detail in our next newsletter. Without giving away the plot, let me say it provides high level direction, reinforces our role as a philanthropic and grantmaking leader for all of Monterey County and reminds us that in order to lead we must first understand who we are and be dedicated to our own standard of excellence.

The word for 2011 will be "transformational." Already the staff is taking its cues from our new plan, developing timelines and work plans for its implementation. General endowment grantmaking. Fund holder services. Community and sector leadership. Asset development. Collaborations. Board and staff development. Communications. Operational investments. Every aspect of the foundation is in a transformative mode.

Monterey County is more than just diverse. It is a study in contrasts. Pacific Grove and Gonzales. Marina and King City. Big Sur and Prunedale. Castroville and Carmel. While it is easy to see and perhaps dwell on the differences in these communities, they are linked in many ways. Monterey County residents commute from one end to the other. Economies are intertwined. Families are spread countywide. And we all want to live in vibrant, safer, healthier communities.

The Community Foundation for Monterey County embraces both the uniqueness created by our diversity and the commonalities that bring us together. There is tremendous energy emanating from the board and staff, and an equally strong sense of commitment to shape the Foundation into an organization that can be both proactive and responsive to the complexity of needs and opportunities we'll encounter in the next several years. Challenges create opportunities, and opportunities create challenges. We're readying to pursue both sides of this equation.

—DAN BALDWIN

GIVING BACK

Bob and Sue Antle Honored

Bob and Sue Antle were honored with the 2010 Distinguished Trustee Award for philanthropic leadership in Monterey County at the Annual Donor Recognition Reception at Corral de Tierra Country Club on October 28. The Community Foundation for Monterey County established the award in 1989 to honor those who have shown leadership in supporting charitable causes in Monterey County.



Bob and Sue Antle accept the 2010 Distinguished Trustee Award

Nearly 250 supporters heard remarks by incoming Chair, Kurt Gollnick and President/CEO, Dan Baldwin and an update on the Literacy Campaign from Jim Bogart. As recipients of the award, the Antles were able to designate a \$10,000 grant from the Community Foundation to the charity of their choice.

A check was presented to the Salvation Army Salinas Corps.

"The Antles epitomize true philanthropic spirit. For decades, they have dedicated themselves to community service, supported dozens of organizations financially, and their commitment to improve farm worker quality of life, including housing, education and health is remarkable," said Vice Chair, Kurt Gollnick.

"It's like the first time you went to church and put a nickel in the box," said Robert Antle while accepting the award with his wife, Sue. "You get a good feeling. You get more back than you put in."



Board member Byrl Anderson-Smith and Sue Antle

PARTNERS IN PHILANTHROPY *continued from page 1*

Can you tell me how you came to understand the importance of an estate gift?

George—The Foundation has been in our will for several years. At the Big Sur Land Trust, legacy gifts have had a huge impact on our ability to further our work. Choosing the Community Foundation as a vehicle for our legacy giving reflects our confidence in the organization. I think your wonderful tagline—"Here for Good"—really says it all. It means you do good things and you're stable, and that you'll be around forever.

Do you have any closing thoughts?

Amy—Don't put it off! It's a relief to get to plan what you want to do. Imagine what you'd like to have happen and make sure that it does. It's rewarding to be able to do something significant for these organizations.

George—Legacy giving helps get your thoughts together and focuses your intentions. It makes you feel good to see wonderful things happening. One fundraiser has a great slogan: "Give 'til it feels good." What better motivation could there be?

Imagine what you'd like to have happen and make sure that it does.

Foundation in their estate plans as member of the Legacy Society. For more information, please contact Tobi Marcus, Director of Resource Development at 831.375.9712 x126 or tobi@cfmco.org. Let us partner with you to maximize the impact of your generosity.

By recognizing the value of lasting generosity, Amy and George join other local philanthropists who have included the Community

DonorCentral Coming in March

DonorCentral is a free, valuable tool available to donors who have established a fund at the Community Foundation for Monterey County.

With DonorCentral fund holders can view and download quarterly fund statements, monitor the market value of their fund, make online grant suggestions from advised funds and access gift information.

For more information call Jackie Wendland at 831.375.9712 x111. We will be happy to personally assist you.

GRANTMAKING

Women's Fund Supports Girls' Health and Women's Economic Empowerment with Record \$85,000

The Women's Fund of Monterey County, a field of interest fund at the Community Foundation for Monterey County, awarded a record \$85,000 for five grants in 2010. This funding represents a major step toward achieving the sustained support envisioned for women and girls in Monterey County.

"Women's economic empowerment and girls' health were the top priorities. Research shows that when women and girls learn, grow and prosper, the entire community thrives."

—JULIE DREZNER, VICE PRESIDENT OF COMMUNITY ENGAGEMENT



Unity Care therapist Michelle Manning, right, providing counseling services.

With the support of Women's Fund donors, the David and Lucile Packard Foundation and the Comerica Charitable Foundation, the Community Foundation awarded a one-year \$75,000 grant to Unity Care Group, Inc. Their office in Salinas assists over 100 youth ages 14-21 who are facing barriers to success in a school or work setting. The grant will support the implementation of the Girls' Health in Girls' Hands (GHGH) research project and a three-year plan for creating a girl-led effort to implement recommendations from the research findings. The grant will also support the formation of three teams of girl leaders to create and lead "health days" for other teen girls.

The Women's Fund also awarded four grants totaling \$10,000 that support women who are at a point of transition to economic self sufficiency. Needs include: car repair, bus passes, occupational training course fees, books or materials. Grants were awarded to: Breast Cancer Assistance Group; Community Human Services - Elm House Circle of Women Fund and the Barbara Davies Women's Health and Wellness Fund; Natividad Medical Foundation and The Village Project.



Fall 2010 grantees attend Community Leadership Project orientation

Grassroots Organizations Strengthened Through Community Leadership Project

The Community Foundation recently announced funding of \$160,000 to strengthen the capacity of four grassroots organizations and their leaders that serve low-income people and communities of color in Monterey County. Each of the following grantees will receive \$40,000 over two years for capacity building activities and operating support: the El Camino Real Futbol League, Girls, Inc., Monterey County

Rape Crisis Center, and National Coalition Building Institute. Grantee leaders will also benefit from participation in the Community Foundation's LEAD Institute.

"The four agencies will benefit from the grant to expand their capabilities and services—from soccer and mentoring teen girls, to sexual violence prevention and social justice," said Julie Drezner, VP of Community Engagement.

Five additional organizations received funding earlier in the year and have begun work on their capacity building plans. The nine grassroots organizations will receive a total of \$360,000 to support their efforts to improve the quality of life in their communities. The grants are part of the Community Leadership Project, a three-year initiative jointly funded by three California Foundations: the David and Lucile Packard Foundation, the William and Flora Hewlett Foundation, and the James Irvine Foundation.

IMPACT

Community and Hospice Foundations Team Up to Improve Care for Children

The Community Foundation for Monterey County and Hospice Foundation have teamed up to fund and improve care for terminally ill children and provide supportive services for their families.

In a unique partnership, a grant of \$78,000 from the Community Foundation to Hospice Foundation, will in turn be regranted to three local nonprofit providers of children's end-of-life care services, and a local community education and outreach organization. "Together, The Pediatric Collaborative provides the full range of services that no one agency can alone," said Alice Kinsler, President and CEO of Hospice Foundation. The grant to Hospice Foundation is the largest single-year grant ever made from the Community Foundation's general endowment grant program.

A majority of the grant, \$73,000, will fund The Pediatric Collaborative, comprised of Jacob's Heart Children's Cancer Support Services, Children's Hospice and Palliative Care Coalition and Coastal Kids Home Care. The grant will help with providing transportation for low-income parents to take their children to doctor's visits, coordination of a child's care and other supportive services. The remainder, \$5,000, will go to Compassionate Care Alliance to help provide community and physician education around end of life care issues.



Photo by Scott McDonald courtesy of the Californian

Derek Aguas, a 13-year old Leukemia patient, and his mother Maria receive support from the Pediatric Care Collaborative funded by the grant. To read more about Derek's story, visit www.cfmco.org/grants.

Sol Treasures Bring the Arts to South County

Sol Treasures' mission is to provide culturally significant art and music classes to youth and adults in a centralized location in South County. In 2007, Sol Treasures opened as an Arts and Cultural Enrichment Center. Over the past four years they have renovated an old house on the city's main street into two art galleries, a gift shop, music classroom, conference room, a mosaic patio for community events and a multi-media room. A former Neighborhood Grants Program grantee and now a nonprofit, Sol Treasures received a grant last year to develop a three-year strategic plan to strengthen their organizational capacity in South County.

Sol Treasures serves 2,000-3,000 individuals annually. Their programs are taught by current or retired high school teachers on a volunteer basis and include classes in art and music including piano, guitar and other string instruments. Residents are invited to free Friday night concerts, open arts studio, poetry readings, readers' theaters and meet the artist events.



Actors waiting for the curtain during Sol Treasures production of *The Jungle Book*.

Monterey County Gives Back

The holiday season was made brighter for 71 nonprofits this year through the Monterey County Gives! campaign. Over \$525,000 was raised for the participating nonprofits in the areas of arts and culture, animals, education, youth, the environment, health, community and social action.

A \$100,000 matching grant will be divided pro rata among the nonprofit organizations based on their percentage of the total donations received. This match was made possible by generous donations from the Monterey County Weekly, the David and Lucile Packard Foundation and Neumeier Poma Investment Counsel LLC.



Additionally, two \$1,000 grants will be awarded. The first will go to the nonprofit that has the most donors, and the second to the agency with the most donors under 36. Younger donors become vital partners to the nonprofit community — they learn the value of philanthropy and continue to support charities both financially (and as volunteers) as they grow older.

The Monterey County Weekly Community Fund is a donor advised fund of the Community Foundation for Monterey County.

MONTEREY COUNTY
WEEKLY

Literacy Campaign Grants \$2.2 million

Since 2006, the Literacy Campaign approved more than \$2.2 million in grants to support adult literacy services in Monterey County.

The Community Foundation's Board of Directors recently approved 11 grants, totaling \$405,000, for the final year of the five-year initiative.



Salinas Valley Community Church Adult Literacy Program

The 2010 grantees are:

Alisal Healthy Start Family Resource Center, \$50,000

Chartwell School, \$10,000

Community Alliance for a Sustainable Economy, \$15,000

Community Housing Improvement Systems and Planning Association, \$80,000

Farmworker Institute for Education and Leadership Development, \$40,000

King City Family Resource Center, \$30,000

Literacy Campaign professional development activities, \$9,000

Monterey Adult School, \$31,000

Monterey County Free Libraries, \$60,000

Salinas Valley Community Church, \$30,000

Soledad Adult School, \$50,000

LEADERSHIP

New Literacy Campaign Nonprofit to be Formed

In response to learning that 25% of Monterey County adults read below the 4th grade level, the Community Foundation for Monterey County launched a five-year (2006-2010), multi-million dollar, civic engagement initiative to open doors to educational and economic opportunities by improving the literacy skills of young adults (ages 18-35).

Since 2006, over 4,000 adults have participated in Literacy Campaign programs and activities to increase their literacy skills. New and innovative programs started such as basic literacy programs at a work-site in Soledad and a faith-based site in Salinas. New collaborations were formed such as a network of literacy service providers and collaborative grantmaking with Monterey Peninsula Foundation, First 5 Monterey County, Dunspaugh-Dalton Foundation, and others.



Founding board of directors, Literacy Campaign for Monterey County, Laurel Lee-Alexander, Len Foster and Alfred Diaz-Infante. Not pictured: Diane Cordero de Noriega and Leslie Payne

The Community Foundation for Monterey County launched a five-year, multi-million dollar, civic engagement initiative to open doors to educational and economic opportunities by improving the literacy skills of young adults.

When the Literacy Campaign began, the goal was to establish a countywide system of coordination to promote best practices and build relationships with and among employers, public agencies, and community-based organizations. After a series of community stakeholder meetings and researching national efforts, it was determined that a separate and dedicated nonprofit organization was the most appropriate structure for this ongoing effort.

Five Steering Committee members agreed to be among the founding members of the new board of directors. They are Chair Elect, Len Foster, retired Director, Monterey County Health Department; Diane Cordero de Noriega, retired Provost and Professor, CSU Monterey Bay, past Chair Literacy Campaign Steering Committee and former Community Foundation board member; Alfred Diaz-Infante, President/CEO, CHISPA and Community Foundation board member; Laurel Lee-Alexander, Director of Grant Programs, Monterey Peninsula Foundation; and Leslie Payne, Literacy Manager, Monterey County Free Libraries.

The main purpose of the Literacy Campaign for Monterey County will be to: raise awareness regarding literacy needs; build partnerships with businesses, literacy service providers and stakeholders; provide leadership around countywide literacy efforts and promote best practices and provide support for ongoing skills development of service providers. The Community Foundation has committed to a four-year \$275,000 grant to the new organization and Monterey Peninsula Foundation approved a four-year grant for \$310,000. The new organization is currently being formed. Visit www.literacycampaignmc.org for more information.

MANAGEMENT ASSISTANCE

Donor Development Institute Offered—NEW

The Community Foundation is committed to strengthening the excellence of the local nonprofit sector. We are offering a new five-part series for organizations with limited or no experience in cultivating individual donors. Smaller nonprofits and grassroots organizations may depend on the support of individual donors but they often struggle to build and sustain this relational approach to fund development over time. Nonprofit staff or volunteers will dive into this learning process with their peers and the trainer. The course will balance both the “art” of building donor relationships with the implementation of a plan through applied activities between sessions. Trainer Lisa Bennett, CFRE works extensively as a fund development consultant and trainer. Visit www.cfmco.org/map to register.



LEAD participants 2010/2011

Applications due March 25 for 2011/2012.

cohort of the LEAD Institute (Leadership Education and Development). LEAD’s multi-faceted approach provides a learning environment conducive to rapid development of leadership and nonprofit management abilities. Applications are accepted now through March 25 for the year long program that begins in September for emerging nonprofit managers in Monterey, Santa Cruz and San Benito counties.

LEAD is supported by grants from the David and Lucile Packard Foundation and the Community Leadership Project, a joint effort funded by the David and Lucile Packard, James Irvine and William and Flora Hewlett Foundations.



Social Media expert Beth Kanter (seated) and CFMC staffers (l to r) Susie Polnaszek, Janet Shing and Kaki Rusmore

nonprofits” know how to use social media to connect, engage and build a network of passionate people who care about their work. Register now for great workshops like these.

LEAD Institute in Full Swing

Leadership today is increasingly complex. Those “at the top” need a leadership team that thinks capably about their entire organization and can respond to the many challenges in our communities.

To help build that team, the Community Foundation has begun recruitment for its third

REGISTER NOW for 2011 Workshops

Winter workshops and other professional development opportunities are now online at www.cfmco.org/map.

Last fall, the Community Foundation welcomed author Beth Kanter, Visiting Scholar at the David and Lucile Packard Foundation, to Salinas for a training on nonprofits and social media.

Kanter shared that “networked

Board Transitions

The Foundation wishes to thank Board Chair Dick Borda, David Armanasco (past Chair), Dr. Jeanette Cisneros, Peter Coniglio and Dr. John Silva for their service.

Four new board members were recently elected to a three-year term. They are Tonya Antle, Stephen Dart, Gail Delorey and John Phillips.

Foundation Offices

Monterey Office

2354 Garden Road
Monterey, CA 93940
Phone: 831.375.9712
Fax: 831.375.4731

Salinas Office

945 S. Main Street, Ste. 207
Salinas, CA 93901
Phone: 831.754.5880
Fax: 831.754.5876

www.cfmco.org
info@cfmco.org

Board of Directors

Byrl Anderson-Smith
Tonya Antle
Paul Bianchi
Jim Bogart
Thomas P. Bohnen, Esq.
Sarah G. Bouchier
Ann Brown
Stephen Dart
Gail Delorey, CPA
Alfred Diaz-Infante
Jeri Gattis, *Secretary*
Kurt Gollnick, *Chair*
Craig Johnson, *Vice Chair*
Kelly McMillin
Judge John M. Phillips, Retired
J. Breck Tostevin, CPA, *Treasurer*
Mark Verbonich



CREATIVE MONTEREY COUNTY ACTION PLAN UNVEILED

The Arts are the answer! That was the finding of the Creative Monterey County Summit held last fall. The goal was to help set a countywide agenda for the arts sector, assess community needs and opportunities, build public and private support for the arts and to update the Creative Monterey County Action Plan. The plan was originally created in 2007 by the Community Foundation and the Arts Council to develop and promote a vibrant, responsive and sustainable arts sector in our county.

Five goals emerged from the summit to guide the work of the Arts Council and other stakeholders in supporting the sector. Participants have pledged to continue to work together to harness the many advantages of the arts to address the unique challenges and opportunities of our region. Read the updated plan at www.cfmco.org to see how you can join the effort to support the arts.

This project was funded by the James Irvine Foundation through the Communities Advancing the Arts Campaign, a multi-year effort aimed at building new, sustainable funding streams for the arts in California.



the **James Irvine** foundation



2354 Garden Road • Monterey, CA 93940

ADDRESS SERVICE REQUESTED

SAVE THE DATES

March 25 LEAD Applications Due

May 12 Women's Fund Breakfast

When a woman thrives, her family thrives and her community prospers. Gather with other Women's Fund supporters to learn about the Women's Fund efforts to change the lives of women and girls in Monterey County. To receive an invitation, please contact Kathryn Hart at 831.375.9712 x120.

Create Your Own Generosity Plan

In her book, *The Generosity Plan*, author Kathy Lemay recommends developing your plan to help focus your charitable efforts for greater impact.

Contact Director of Resource Development, Tobi Marcus at 831.375.9712 x126 to see how the Community Foundation can help you leverage the value of your own charitable giving.



Photo by Richard Green

(l to r) Board members Tonya Antle, Jeri Gattis and Director of Resource Development, Tobi Marcus

Non-Profit
US Postage
PAID
Permit No 137
Monterey CA