



Photo by Beth Cary King

## “Healthy, Safe, Vibrant Communities”

—DAN BALDWIN, PRESIDENT/CEO

**Healthy, safe, vibrant communities.** These words capture the essence of philanthropy and nonprofit work, and now comprise the new vision statement of the Community Foundation for Monterey County. Supporting this vision is our new mission statement: *“To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County.”*

A mentor of mine once said the vision is what you do and the mission is how you do it. These statements bring clarity to the core purpose of the Foundation. Striving for communities that are healthy, safe, vibrant would seem so fundamental as to be obvious, yet there is genuine value in openly stating the tenets that are primary in our work.

Our mission statement has component parts that support community building. “To inspire philanthropy” speaks to our role as a trusted steward of charitable assets, to make grants that demonstrate how a philanthropic act can provide valuable resources that impact individual lives – and inspire others to do

the same. If we’re successful at inspiring, then by definition we’re acting as a “catalyst for strengthening communities.” The Community Foundation is a trusted partner in facilitating solutions to important issues. Throughout Monterey County means exactly that. Carmel to King City. Pajaro to Big Sur. Salinas and Monterey. It’s a very big job. It requires philanthropic partnerships that span our great county. We welcome the challenge.

*To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County*

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This newsletter outlines the three goals that emerged from our recent strategic planning process, all of which support our new mission and vision. We invite you to partner with us in this work.

**GOAL ONE:** **COMMUNITY IMPACT** – Invest in developing healthy, safe and vibrant communities across Monterey County.

**GOAL TWO:** **PHILANTHROPIC LEADERSHIP** – Inspire and facilitate philanthropy throughout Monterey County.

**GOAL THREE:** **OPERATIONAL EXCELLENCE** – Optimize performance and stewardship for maximum impact.

## Communities Advancing the Arts Offered Multifaceted Support

As part of our commitment to providing the greatest possible community impact, we work with nonprofit organizations to strengthen their capacity to accomplish their missions. This spring marks the culmination of six years of work with local arts organizations through Communities Advancing the Arts (CAA), expanding their ability to reach more diverse audiences and donors and improve internal capacity to inspire support for arts and creativity.



Communities Advancing the Arts (CAA) organizations participate in the Donor Development Institute.

The Foundation worked with 16 major arts institutions to prepare endowment building and planned giving programs to ensure long-term sustainability. With 15 small to mid-size organizations, we assessed their abilities to develop financial support, identified strategies, and helped build the skills to implement them. Organizations benefited from professional consultants, specialized workshops and small grants based on their unique circumstances through our Management Assistance Program.

Another outcome of CAA was the production of *Creative Monterey: The Action Plan*. Foundation staff worked closely with the Arts Council of Monterey County to produce the plan designed to unleash the creative capacity of our local economy. This spring marked an update on the plan and its strategies, with wide support from business, government and the arts sectors.

Communities Advancing the Arts was funded by the James Irvine Foundation with support from the David and Lucile Packard Foundation.

# GOAL ONE

## COMMUNITY IMPACT

### *Invest in developing healthy, safe and vibrant communities across Monterey County*

Grantmaking that supports local efforts to strengthen Monterey County communities is core to the Community Foundation's mission and role. A key objective of the strategic plan is to focus the Community Foundation's grantmaking toward more strategic results. With this in mind, we are moving forward with redesigning the Foundation's major competitive grants program — called the General Endowment — which is the Community Foundation's largest fund, made up of numerous unrestricted and field of interest bequests established by local donors over the years.

Our new grantmaking approach will focus on the people and places of Monterey County, seeking meaningful results. Our vision of "Healthy, Safe, Vibrant Communities" will guide all our work throughout the period of the strategic plan redesign and beyond. We have two primary aims: to clarify our grantmaking priorities based on an assessment of community needs and opportunities for impact; and to have more community involvement in determining where grants will make the greatest difference.



Top: The Grants and Program committee discusses priorities.

Below: Committee members (l to r) Billy DeBerry, Mark Verbonich, Alfred Diaz-Infante, Kurt Gollnick, Jackie Cruz Ortega, Kelly McMillin, Ann Brown and John Phillips.  
Not pictured: Elliott Robinson

In the coming months, we will examine diverse needs across our county, evaluate best practices and seek community input on needs and issues that matter most in a broad range of areas impacting community life, including arts, environment, education, economic security, health and community services and youth and community development.

New funding guidelines will be announced this fall with a revised schedule and application process for grantmaking in 2012. A series of community information sessions will be held throughout the county in October and November of this year to ensure that all potential grantees understand how to access these important grantmaking resources in the future.

# GRANTMAKING

Community Foundation grants extend throughout Monterey County and result from various processes including application for competitive selection and donor advised recommendations. Following are just three examples of the wide range of programs that Foundation grants have supported over the past several months.

## A Safe Haven

The **Redwings Horse Sanctuary** received a donor-advised grant from The Lenore and Dale Meyer Fund of the Community Foundation for Monterey County. The agency's mission is to end abuse, neglect, and slaughter of horses, ponies and burros through rescue and foster care. Their 167-acre ranch location in Lockwood provides a permanent home for horses that have experienced such serious physical and psychological damage that complete rehabilitation and placement in a new home is impossible. Redwings also provides equine care and education seminars throughout Northern California and helps low-income equine owners with financial and education assistance through their Helping Hooves Program. In addition to saving lives and providing a safe haven for abused and neglected equines, the work of Redwings helps educate the public about the plight facing horses.



*Melissa and Charisma live out their days in peace.*

## Caregivers Receive Support

This General Endowment grant specifically supports the **Del Mar Caregiver Resource Center** in Salinas, one of several health-related projects of the Health Project Center (HPC). This program provides support annually to over 1,000 family caregivers of brain-impaired adults who may suffer memory loss, confusion and severe physical limitations. Services include respite care, family consultations to develop a care plan, legal consultations, individual counseling and stress management, and support groups with other caregivers. Eighty percent of all long-term care services in the U.S. are provided by family caregivers so support for them is critical to maintaining our long-term care system. While HPC has lost 72% of its government funding in the last year, it anticipates at least a 20% increase in request for services this year alone. This grant will help bridge that gap with increased private funding to maintain these critical family services.



*Del Mar Caregiver Resource Center provides support to people like this young woman who is caring for her grandmother*

## Youth Explore Creativity

The **Alisal Center for the Fine Arts (ACFA)** in East Salinas received the Ingenuity Award of \$2,500 (sponsored by the Community Foundation) for their big idea submitted to the Monterey County Gives campaign supported by donors to the Monterey County Weekly Community Fund. The group averages 240 students in its workshops and is planning to expand. Their proposal requested funding to offer a multimedia workshop, vocal music and mariachi programs. The ACFA keeps young artists safe and busy expressing their creativity through constructive activities. The entire Monterey County Gives campaign raised over \$529,000 for 71 nonprofits last fall. (See [www.mcgives.org](http://www.mcgives.org) for information).



*Young artist explores his creativity at Alisal Center for the Fine Arts*

## Giving Back

Tony Ayres and his wife Marjorie agreed to establish a designated fund, the **Tony P. and Marjorie Ayres Fund**, to benefit Kinship Center and the Visiting Nurses Association. These organizations were meaningful to them as Marjorie herself was adopted and they appreciated the service they received from the Visiting Nurses Association.



Marjorie & Tony Ayres

*"We were happy with how our lives turned out. I volunteered for many organizations with Marjorie's support, and we gave back to the community in our lifetime. We wanted a way to keep giving back after we were gone."* —TONY AYRES

After raising two daughters and a son, these long-time Pacific Grove residents wanted to give back to the community they called home. Married just 2 months short of 61 years, the fund was established upon Marjorie's death at the end of 2010. Tony is also planning to add to the fund through his estate plan.

"We were happy with how our lives turned out. I volunteered for many organizations with Marjorie's support, and we gave back to the community in our lifetime. We wanted a way to keep giving back after we were gone," said Tony.

Contact Director of Resource Development, Tobi Marcus at 831.375.9712 x126 to see how the Community Foundation can partner with you to fulfill your charitable giving goals.

# GOAL TWO

## PHILANTHROPIC LEADERSHIP

### *Inspire and facilitate philanthropy throughout Monterey County*

"To inspire philanthropy" has always been integral to the work of the Community Foundation and is now expressed as core to our new mission statement. We are here to help our partners make the most of their charitable giving. In so doing, our asset base, currently at \$140 million, will continue to grow. Over one third of these assets drive the Foundation's general endowment grantmaking, a large proportion for an organization of this size.

*Philanthropy funds grantmaking which creates community impact. Creating impact, in turn, inspires philanthropy.*



Photo by Richard Green

Past Trustee Award recipient Sherrie McCullough (left), with board vice-chair Craig Johnson and his wife, Christine.

By sharing fund holder stories, honoring philanthropy with our annual trustees' award, and making successful grants, our hope is that those who would like to give back to Monterey County will choose the Foundation as a trusted partner in their charitable giving. By growing the Foundation's assets through new funds, bequests and contributions to existing funds, we can support a grantmaking program that is fully responsive to the changing needs in our county.

The Foundation strives for proactive engagement with our current fund holders in order to support their philanthropic goals and to involve them more fully in our work.

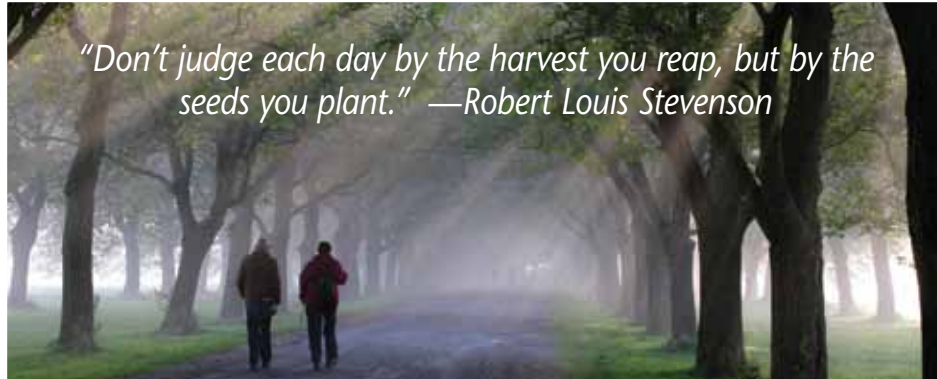
One of the ways we will be keeping in touch is through the implementation of DonorCentral, which allows 24-hour online account access (see photo page 7). The capabilities include information on fund holders' grantmaking priorities so that we help them make grants which match their interests. Our deep community knowledge will help inform grantmaking and we will continue to bring like-minded donors together to discuss areas of mutual interest.

A third goal is to seek and align with funding partners, such as other grantmakers, to realize greater community impact. We will proactively seek to leverage our own grantmaking for increased benefit to the communities in our region.

# LEGACY

## What is Your Legacy?

How will you express your values, experiences and interests to the next generation? By carefully planning your estate, you can benefit yourself, your family and your community. With thoughtful preparation now, you can be sure your assets will be directed to the causes you care about in the future.



Gifts provided through wills or trusts have become a cornerstone of the American philanthropic tradition. Such gifts enable you to make significant contributions that may not be possible during your lifetime. When you include a charitable component in your will, you may reduce your estate taxes while supporting your community. Through a bequest to the Community Foundation you can support specific agencies, a field of interest or the community in general.

## The Legacy Society

The Legacy Society recognizes individuals who have remembered the Community Foundation for Monterey County in their will or estate plan or make the Foundation the beneficiary of life-income gifts. While we recognize those who have notified us of their plans, we also appreciate those who wish to remain anonymous.

*"Giving through your estate is a chance to reflect what you valued most during your lifetime. We ensure that your wishes and priorities are honored into perpetuity."* —TOBI MARCUS

Legacy Society members are invited to a special event each year with a chance to connect with like-minded individuals. Members are recognized in our Report to the Community and also receive an invitation to our annual celebration of philanthropy.

If you have included the Community Foundation in your estate plans and would like to be included in the Legacy Society, please let us know so we may recognize you and include you in our upcoming events.

Contact Director of Resource Development, Tobi Marcus or President/CEO, Dan Baldwin at 831.375.9712 to see how the Community Foundation can help you create *your* legacy.

## Legacy in Action

Mary Jane Drummond expressed her generosity by leaving a sizable unrestricted estate gift to the Community Foundation that



will positively impact our grantmaking in perpetuity. Since the principal of the endowment is never spent and continues to grow over time, the amount of her gift will be granted to the community many times over.

Over the years Mary Jane participated in church activities and fundraisers and was active in the Bing Crosby/ then AT&T golf tournaments.

Her husband, the late Judge Ralph Drummond, was a former board member of the Community Foundation for Monterey County. The couple came to Monterey in 1960 and Ralph was hired as an Assistant District Attorney for the County. He was appointed to the Superior Court bench in 1969 by then Governor Ronald Reagan and served until his retirement in 1983.

After Ralph's passing in 2006, Mary Jane continued to support their favorite charities which included Rancho Cielo, the Carmel Foundation, the Monterey Boys and Girls Club and St. Jude's Hospital. She was very proud to be able to view the completion of The Drummond Culinary School at Rancho Cielo. Thanks to this legacy gift, her generosity will continue to make a difference.

## Community Foundation Receives “Seal of Approval”

The National Standards Seal shown below signifies that the Community Foundation for Monterey County has met rigorous National Standards and has demonstrated its commitment to financial security, transparency and accountability.



“This is critically important to our supporters,” said Kurt Gollnick, Board Chair. “When people partner with the

Community Foundation to establish a fund or make a charitable bequest, they do it knowing that we have met the highest industry standards.”

*“The National Standards Seal says our house is in order. It is excellent validation of the work we do on behalf of our fund holders and our community.”*

—DAN BALDWIN, PRESIDENT/CEO

The process of meeting National Standards is arduous. The program requires community foundations to document their policies for donor services, investments, grantmaking and administration. Documentation is then reviewed by a national panel of community foundation experts, appointed by the Council on Foundations in Washington, D.C.

The Community Foundation for Monterey County was confirmed in compliance with National Standards first in 2006 for five years and again in April 2011.

# GOAL THREE

## OPERATIONAL EXCELLENCE

### *Optimize performance and stewardship for maximum impact*



Jackie Wendland shares DonorCentral technology with fund holders Mary Claire Colburn and her nephew Ryan Anthony Flagg.

The third statement in our strategic plan centers on operational excellence, a nod to the always present responsibilities of stewarding charitable assets and our donors’ intent. The Community Foundation for Monterey County exists only because of the philanthropic vision of the donors who put their charitable assets in our care. The discretionary nature of these acts inspire us to a powerful sense of stewardship. We have been entrusted with these assets.

First and foremost is governance.

Nonprofits are led by volunteer citizen boards who give tremendous time and effort to ensure that the organization is not only delivering on its mission but doing so with an efficient use of resources. In the case of the Community Foundation, board oversight of grantmaking, programs, resource development, investments and self-governance is ever present. So much so that it was important to openly state it, to communicate to others, and remind ourselves, of this core set of responsibilities.

Evidence of this commitment was recently reinforced when the Foundation was notified of our recertification of being in compliance with National Standards, the closest thing to accreditation that exists in our field. The standards, which cover every aspect of operations, policies and governance, were developed by the Council on Foundations, our national association. (See article at left).

There are several ways we are working towards the goal of operational excellence. We strive to be a model for nonprofits in our area and adopt best practices in all facets of our work. In addition to our grantmaking redesign, we are broadening our communications strategy to include social media. We are also investing in technology such as DonorCentral, which allows fund holders online access to their funds. We are examining all of our internal processes for greater efficiencies.

We will continue to invest in infrastructure (human, financial and technological) improvements, elevate our visibility countywide through communications and build and maintain a strong, innovative, diverse board of directors and staff that reflect and understand the needs of Monterey County.

# NEW FUNDS

## Strong Future Assured for Kernes Adaptive Aquatics

Kernes Memorial Pool improves the health, abilities and quality of life for children and adults with disabilities or special needs through its warm-water pool and water exercise programs.

"The Kernes Adaptive Aquatic Stewardship Fund is an important step to keep our future strong," says Lynn Young, Executive Director.

*"We learned an important lesson in this recession: in the day-to-day work to 'stay afloat,' we cannot lose sight of the future"*

—LYNN YOUNG, EXECUTIVE DIRECTOR

Their board decided to open the fund to provide an opportunity for supporters to invest in the nonprofit's future through bequests, or donations of stocks, property or other assets. Its purpose is to provide long-term sustainability for Kernes Pool and its programs.

"Opening our Stewardship Fund is a tremendous opportunity for us. It allows us to focus on what we do best, while giving our supporters the confidence that their investment in our future is well cared for," said Young.



People of all ages and abilities enjoy the pool. All receive relief that only warm water exercise can provide. Shown here, arthritis aquatics.



Young visitor studies monarch up close.

## A Passion for Monarchs

Helen Johnson has long been passionate about monarch butterflies. As a girl she enjoyed exploring all of nature. After learning about the possible sale of the Pacific Grove sanctuary to private developers, she became a charter member of the Friends of the Monarchs. She later learned that only the Pacific Grove sanctuary was included in annual counts, underreporting the number of butterflies she had personally observed. Helen then became the only private donor to the Monarch Alert Program of Cal Poly San Luis Obispo, supporting them for the past 10 years in monitoring local monarch populations.

Helen established the **Monarch Sanctuary Fund** to support the Butterfly Sanctuary into perpetuity as a safe haven for this fragile creature. Her goals are to improve habitat maintenance and interpretation, support educational efforts and expand the area. Community members who share her interests have contributed to the fund. Says Helen, "The goal is to let the whole wide world know what a local treasure these butterflies are and to join in supporting them!" The fund provides a way to do this.

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# NEW MISSION & VISION UNVEILED

## “LIKE” US ON FACEBOOK

The Community Foundation is now on Facebook. You can visit us on our page at [www.facebook.com/cfmco](http://www.facebook.com/cfmco). You can also find us on LinkedIn, Youtube and we are “listening” on Twitter as we embrace the world of social media.

As part of our goal of operational excellence and modeling best practices, we are committed to engaging in important community conversations and being more accessible and transparent as an organization. If you have a Facebook account, please visit and “like” our page to share your ideas and hear updates on nonprofit news, grantmaking, philanthropy and more. Be sure to ask questions and tell us what you think!



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