

COMMUNITY FOUNDATION FOR MONTEREY COUNTY



2010 ANNUAL REPORT

Our Mission:

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



Enjoy these snapshots of *your* Community Foundation as we work towards building healthy, safe, vibrant communities.

CONTENTS

- 1 Letter to the Community
- 2 Inspiring Philanthropy
- 4 Leaving a Legacy
- 5 Women’s Fund
- 6 Programs and Initiatives
- 10 Grantmaking Impact
- 14 Ways to Give
- 15 2010 Contributors
- 20 2010 Financial Summary
- 22 Board and Staff
- 24 Committees
- 24 In Memoriam

QUICK FACTS

- ▶ Total assets grew by 8.01% to \$137,678,876 million.
- ▶ The Community Foundation’s Portfolio return on investments was 13.9%.
- ▶ The Foundation received \$5.1 million in contributions and 12 new funds were opened.
- ▶ \$6.4 million in grants, awards and scholarships were approved for distribution to 362 grantees.
- ▶ Total operating expenses were 1.6% of total assets.

Cover Photos: Animal Friends Rescue Project, Arts Council’s “Art is Here” project, Neighborhood Grants Program grantee Deportivo Leon

Letter to the Community

MESSAGE FROM THE CHAIR AND PRESIDENT

2010 was a year of great transition at the Community Foundation for Monterey County. It marked the retirement of Todd Lueders, who, as founding President/CEO, stepped down after 29 years of stellar leadership. Thanks to the planning and foresight of the board of directors, Todd and the rest of the staff, what could have been a bumpy time for the Foundation was exactly the opposite: we didn't miss a beat. We continued to grant, grow and demonstrate leadership within the nonprofit sector and throughout Monterey County.

Statistics alone don't tell the whole story, but we've got a few to share that will help get us started. More than \$6 million in grants. More than \$137 million in total assets. 13.9% investment return, which signaled a complete rebound from the financial trauma of 2008. Hundreds of nonprofit professionals and board members served through our Management Assistance Program.



"As my term ends, I feel confident that the Foundation has great momentum and will even increase its leadership role in serving our community." —DICK BORDA

By mid-year the Foundation was actively engaged in strategic planning. Both the board and staff worked with tremendous energy to look at our role in Monterey County and develop plans to make sure we are meeting the needs of the community as effectively as possible. We recommitted ourselves to the concept of working countywide – in grantmaking, programming, and resource development – and to do so with an ever-present dedication to excellence. This led to the development of new mission, vision and values statements which will guide our work for many years to come.

2010 saw the end – and the beginning – of the Literacy Campaign. The Foundation's largest independent initiative ended after five years of effective work. We want to thank the volunteers who gave many hours through their work on the Literacy Campaign Steering Committee, especially retired board member Diane Cordero de Noriega and Program Officer Janet Shing. The impact of the Literacy Campaign was deemed so essential to countywide educational efforts that a new nonprofit organization of the same name has been launched to carry the work forward.

We hope you enjoy this report. We believe it embodies the idea that the Community Foundation for Monterey County is only as effective as our ability to engage a large and diverse group of people in the critical work of philanthropy, grantmaking and leadership. **It's the "community" in Community Foundation that makes it all go.**

Richard J. Borda
Board Chair 2009-2010

Daniel R. Baldwin
President/CEO

Inspiring

phi·lan·thro·py *from the Greek: **philanthropos**, defined as "humanity, benevolence or loving of human kind."*

The mission of the Community Foundation is to inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County. Philanthropy is not limited to those who demonstrate their community spirit by writing large checks. The Foundation is accessible to everyone who wants to make a difference. Contributions of any amount are welcome to all of our nearly 300 funds including our field of interest funds, the Women's Fund, Fund for the Environment, Out Reach, Fund for the Arts or Fund for the 21st Century.

Individuals can also choose to establish their own fund, in their lifetime as a donor advisor, or through a planned gift. For those who establish a donor advised fund, the Foundation handles all the administration and investment of the assets, and the fund holders have the pleasure of

directing the gifts to the causes that matter most to them. Our due diligence and deep community knowledge ensure that your grants will have the maximum impact.

The Foundation has become a trusted philanthropic partner in part because of its careful stewardship of community resources. Hundreds of individuals have come to count on the Community Foundation to ensure their charitable giving has the greatest impact now and in the future. We are here to help you achieve your philanthropic goals. By sharing stories such as Lenore and Dale Meyer's (page 3) and honoring philanthropy in our community through our Distinguished Trustee Award (below), we hope you are inspired to partner with us.



(l to r) Bob Antle, Sue Antle, Kurt Gollnick, Major David Yardley / Alfred Diaz-Infante, Jr and Jim Gattis / Peter and Incy Brooks

Photos by Richard Green

DISTINGUISHED TRUSTEE AWARD

Each year the Community Foundation honors an individual or couple who demonstrates exceptional generosity and commitment in supporting nonprofit organizations that serve Monterey County. In 2010, the Distinguished Trustee Award was presented to Bob and Sue Antle. 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.

The recipient is given the opportunity to designate a \$10,000 grant to the nonprofit of their choice, and the Antles selected the Salvation Army Salinas Corps. As Bob Antle noted "It's like the first time you went to church and put a nickel in the box. You get a good feeling. You get more back than you put in." Seeing the joy and satisfaction that those who give back to the community experience often inspires others to do the same.

Past Honorees

- | | |
|--|---|
| 2010 – Bob and Sue Antle | 1998 – Patricia Tynan Chapman |
| 2009 – Julie Packard | 1997 – Margaret Owings |
| 2008 – Sherrie McCullough | 1996 – Basil E. Mills |
| 2007 – Maggie Downer | 1995 – David Packard |
| 2006 – Clint and Dina Eastwood | 1994 – Harriet R. Thurmond and Sarah T. Hermann |
| 2005 – Ed and Terry Haber | 1993 – Francis H. Cislini |
| 2004 – Michael McMahan, Neal McMahan, and Marsha McMahan Zelus | 1992 – Marshall Steel, Jr. |
| 2003 – Davis Factor, Jr. | 1991 – Virginia Stanton and Gordon Paul Smith |
| 2002 – Joanne Taylor-Johnson | 1990 – Ruth P. Fenton |
| 2001 – Hilton and Roberta Bialek | 1989 – John A. McCone |
| 2000 – William and Nancy Doolittle | |
| 1999 – Jim and Jeri Gattis | |

Philanthropy

GIVING IS AN ART

LENORE AND DALE MEYER

Lenore Meyer and her daughter Dale have turned giving into an art form. Creating art runs in the family. Patriarch Hank Meyer was legendary in the public relations field in South Florida. He would often draw doodles while creating ideas or problem-solving in his work. Lenore, an artist, poet and drama teacher, saved the drawings and turned them into the sculptures that now grace her garden.

Dale, a former PR executive in the family business, and a ballerina for 17 years, is an artist herself. She designs one-of-a-kind jewelry that has also benefitted nonprofits from coast-to-coast. Dale and Lenore treat their giving with as much care and attention as they do their artistic creations.

"We believe in giving back in life and being creative in how to solve problems in the community. Our motto is: 'Give where you live.'"

—LENORE & DALE MEYER

Lenore and her husband Hank met in Miami Beach and were married just five weeks later, a union that lasted 50 years. Hank was a community builder who joined forces with others to make a positive difference. The way he gave back of his time, talent and expertise was a strong influence on his family. Lenore and Dale wanted to create lasting messages of inspiration from Hank's philosophy of life, and the sculptures Lenore created expressed that feeling. As a result, they have established meditation gardens adorned with Lenore's sculptures at four hospitals and sculpture installations at two others.

After spending summers in Monterey since 1984, Lenore and Dale moved to Carmel in 1997. Though Florida will always have a special place in their hearts, they have "fallen in love" with the Monterey area and now reside here permanently. When asked why they choose Monterey County as the focus of their giving, Dale and Lenore say that they give because of their dedication to the communities they live in. "We believe in giving back in life and being creative in how to solve problems in the community. Our motto is: 'Give where you live.'"



Lenore Meyer (left) with her daughter Dale and their Maltese "Morgan" in front of Lenore's sculpture "A Prayer to the Sun"

They learned of the Community Foundation through their attorney and accountant and created The Lenore and Dale Meyer Fund last year. "The staff and organization are very dedicated. We appreciate their quiet professionalism and look forward to a long relationship," noted Lenore.

"Dale and I decide hand-in-hand on our giving," adds Lenore. They focus their philanthropy on the environment, the arts, health, animal welfare and emergency services. Lenore has included their fund in her estate plans. Just as Lenore's sculptures will always provide inspiration and serenity, the family hopes their spirit of giving will make a lasting impact for years to come.



Lenore Meyer outside her studio with her sculpture "Love Story"

Leaving a Legacy

What is the legacy you are creating today? Your values, experiences and interests can all be passed on to future generations through legacy gifts. Fund holders have the pleasure of working with the Community Foundation to support causes they care about in their lifetime. When you plan your estate with your legacy in mind, you can continue to support those organizations that are important to you, or leave unrestricted gifts, making an impact for years to come. The Foundation is not simply a steward of donor assets but also of your philanthropic intent. We ensure that your wishes are honored into perpetuity, long after the gift or bequest is made.



You can pass your values on to future generations through legacy gifts

"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, you're stable and that you'll be around forever."

—LEGACY SOCIETY MEMBERS AMY ANDERSON AND GEORGE SOMERO

The Legacy Society

The Legacy Society recognizes individuals who have included the Community Foundation in their will or estate plan or made the Foundation the beneficiary of life-income gifts.

Anonymous (3)
Yvonne A. Ascher and Leonard Laub
Tony Ayres
Robert P. Balles
John B. Bergin
Paul P. Bianchi
Nancy Bletzer
Maggy Wilson Boast
James W. Bogart
Thomas Bohnen
Julie A. Cason and Lisa K. Crawley
Joseph and Betty Chaffers
Katherine M. Coopman
Wallace F. and Lucille Davis
Martin Dodd
William and Nancy Doolittle
Stephen Eimer and Kevin Ann Cartwright
Frances H. Elgan
Roberta Elliott
Norma Esselstyn
Lowel I. Figen
Captain and Mrs. Cyrus and Jean Fitton
Crawford E. and Linda P. Foy, Jr.
Donald and Frances Gaver
Rodney and Betty Guilfoil
Terry Haber
Lyle Hall

Ruth Hartmann
Peter C. Hatton
Virginia O. Hawes
Dick Hawkinson
Thomas Hart Hawley
Jeanne S. Holmquist
Robert and Millie House
Jack Jewett
Joanne Taylor Johnson
Mark and Susan Johnson
Alice V. Kinsler
Paul Lawrence and Marian Buccafurni
Dorothea Terry Layne
David S. and Norma Lewis
Esther H. Lindsey
Robert H. Lindsey
Todd Lueders
John Mahoney
Jan and Tannie Mandel
Roger and Carolann Manley
Mike and Tobi Marcus
Joseph A. and Sheila Mark
Sherrie McCullough
Thomas D. Melville
Lenore Meyer
Sidney Morris
Robert I. and Leslie Mulford

Alec and Kim Murdock
David M. and Julie Nee
Vicki Nelson
Diane R. Nonella
Charles Olvis and Miranda Morris
Nicholas M. and Nicollette Pasculli
John and June Dunbar Phillips
Gregory A. and Winoma Plaskett
Margaret L. Radunich
Rex and Joan Reade
Paul Rochester
Lee and Shirley Rosen
James C. Sanders
Kenneth C. Schley
JeriAnn Shapiro
Robert B. Sheppard
Janet L. Shing
Laura Sinks
Pamela D. Smith
Charles Snorf
George Somero and Amy Anderson
Loren Steck and Annette Yee Steck
Judy Sulsona
Tom Sweeney
Fredrick W. Terman and Nan Borreson
Peter and Anne Thorp
Vincent and Evelyn Torras
William H. and Susanne S. Tyler, III
Patricia Tynan-Chapman
William Umeki
Nels P. Wiegand
Richard Zahm

Paying it Forward

THE WOMEN'S FUND OF MONTEREY COUNTY

The Women's Fund of Monterey County was founded as a field of interest fund of the Community Foundation in 2003 to fill a gap in funding directed toward women and girls in Monterey County. Since 2007, it has awarded over \$150,000 and brought together donors, grantees and other community members to support women and girls in Monterey County. The Women's Fund is a member of the Women's Funding Network — sharing expertise, best practices and common evaluation tools with more than 150 women's funds worldwide.

"Research shows that when women and girls learn, grow and prosper, the entire community thrives."

—JULIE DREZNER, VICE PRESIDENT OF
COMMUNITY ENGAGEMENT

WOMEN'S FUND GRANTS

The Women's Fund awarded a record \$85,000 through five grants targeting girls' health and economic self-sufficiency for women. This funding represents a major step toward achieving the sustained support envisioned for women and girls in Monterey County.

GIRLS' HEALTH IN GIRLS' HANDS

With the support of Women's Fund donors, the David and Lucile Packard Foundation and the Comerica Charitable Foundation, the Community Foundation awarded a \$75,000 grant to Unity Care Group, Inc., which serves more than 2,500 youth and their families in an eight-county region. Unity Care will establish a three-year plan for creating and sustaining a girl-led effort to implement recommendations for improving girls' access to health information and services, based on the findings of the 2008 Girls' Health in Girls' Hands action research project. Unity Care Group will also form teams of girl leaders in three Monterey County communities as they create and lead "health days" for their peers.



Women's Fund partners Linda McGlone (back left) and Traci Townsend (back right) with Girls' Health in Girls' Hands participants

ECONOMIC SELF-SUFFICIENCY

The Women's Fund also awarded four grants totaling \$10,000 that focused on supporting women who are at a point of transition to economic self-sufficiency. The goal is to enhance the ability of community organizations to provide direct financial support to individual women at a time when a modest amount of assistance could make a big difference in getting a job, going to school, or obtaining other resources needed to move toward greater self-reliance. These needs might include car repair, bus passes, occupational training course fees, books or materials. Grants were awarded to: Breast Cancer Assistance Group of the Monterey Peninsula, Community Human Services, Natividad Medical Foundation and The Village Project.

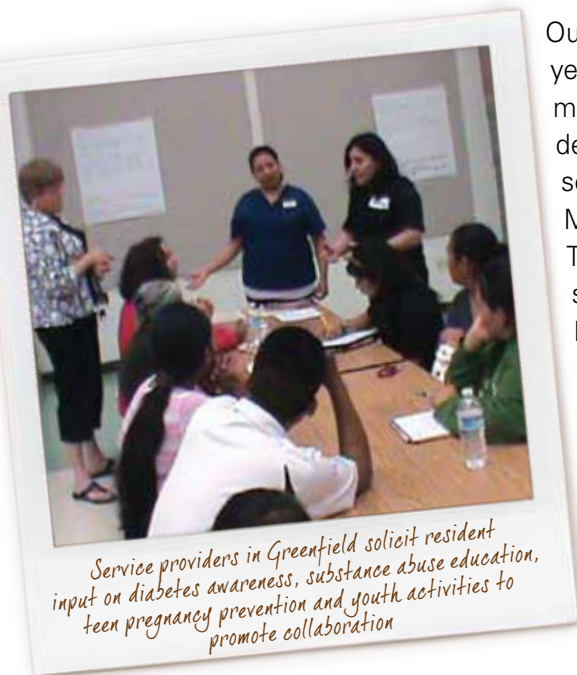


Community Human Service clients Paulette (l) and Kristen (r) with case manager Helga Ralston (standing)

Strengthening

SOCIAL NETWORK SUPPORT

Communications and technology are changing the way we live and work. Thanks to a two-year grant from the David and Lucile Packard Foundation, the Community Foundation was able to learn and explore how social network supports can increase nonprofit organizations' effectiveness. These supports include facilitating discussions, network analysis (using network mapping software) and recognizing how each organization's work can help address larger objectives.



Service providers in Greenfield solicit resident input on diabetes awareness, substance abuse education, teen pregnancy prevention and youth activities to promote collaboration

Our work in the past year focused on mapping youth development services in Monterey County. These visual maps show connections between individuals working in the youth field. Connections include prior collaborations, interest in future partnerships,

professional development topics and advocacy interests. This project was especially revealing because the maps could be compared with an earlier youth network map generated in 2007. Last year Foundation staff also provided network training in the form of a learning community (people learning together and from each other). Training topics included an introduction to network theory, network health and lifecycles, participation, engagement and tools for strengthening local networks.

As a result of this work, a number of short-term and larger-scale efforts are underway, including countywide and volunteer projects. More information on network effectiveness, philanthropy and what we've learned is available at www.cfmco.org (community initiatives).



Grantees participate in training as part of the Community Leadership Project

COMMUNITY LEADERSHIP PROJECT

The Community Foundation's support of the Community Leadership Project (CLP) is guided by a belief that effective community-based organizations and diverse leadership in our nonprofit sector are key to a vibrant, prosperous Monterey County.

The Community Leadership Project is a joint effort funded by three California foundations (the David and Lucile Packard, James Irvine, and William and Flora Hewlett Foundations) to strengthen grassroots organizations that serve people of color and low-income communities in the greater San Francisco Bay Area, San Joaquin Valley and Central Coast. The Community Foundation for Monterey County is one of the intermediaries chosen to distribute grants and provide technical assistance and leadership programs to organizations in Monterey County.

Nine grassroots organizations were selected to participate in our Community Leadership Project, which includes two-year grants of \$40,000 each and carefully targeted capacity building support to help these organizations grow, flourish and, ultimately, be equipped to fulfill their missions to positively affect the lives of low-income residents in Monterey County.

Participating organizations include: the Alisal Center for Fine Arts, Central Coast Center for Independent Living, Communities Organized for Relational Power in Action (COPA), El Camino Real Futbol League, Girls Inc., Monterey County Rape Crisis Center, National Coalition Building Institute, Second Chance Youth Program and The Village Project.

Nonprofits

MANAGEMENT ASSISTANCE PROGRAM

The Management Assistance Program (MAP) provides resources to strengthen nonprofit leadership and management so that local organizations can more effectively serve Monterey County communities. MAP offers professional development, information, funding and consulting resources to nonprofits of all sizes and in all fields.

In 2010, MAP presented or co-sponsored 18 workshops on nonprofit governance, management, leadership and fund development for 411 participants from nonprofit organizations throughout Monterey County. Twenty-seven technical assistance grants totaling \$82,000 were awarded to upgrade technology, improve fund development capabilities and support strategic planning.



In addition, individualized support was provided through consultations with staff, referrals to local consultants, peer support for nonprofit leaders, and the Stanford Alumni Consulting Team (SACT). Through the SACT program, Stanford University Business School Alumni offer pro bono consulting to selected nonprofits.

MAP was also able to offer more robust workshop registration and online resources to our nonprofit partners through the Community Foundation's new website at www.cfmco.org/MAP.



LEAD INSTITUTE (Leadership Education and Development)

The Community Foundation for Monterey County established the LEAD Institute to develop and retain a diverse pool of nonprofit leaders in the Monterey Bay region, including Santa Cruz and San Benito counties. LEAD also benefits local organizations through its participants' capacity to acquire new skills and information, leading to improved community outcomes.

"The LEAD program has empowered me with the tools to see beyond my own perspectives, the clarity to redefine my own authentic leadership, the courage to promote change, a better way and with the principles to sustain cultural diversity and tolerance."

—MARITZA ALLEN, INTERIM INC., LEAD GRADUATE

In 2010, 19 emerging nonprofit leaders graduated from the LEAD Institute, with a joint certificate from California State University Monterey Bay's Extended Education and the Community Foundation for Monterey County. Twenty leaders from Monterey, Santa Cruz and San Benito counties are participating in the 2010-2011 class. These capable nonprofit managers receive intensive training on a wide array of nonprofit management topics and develop the skills to contribute to their organizations' leadership teams. As part of the program, LEAD participants each work with a leadership coach on personal and professional development goals, and apply their new skills through a project in their organization.

LEAD received partial funding from the Community Leadership Project, a joint effort funded by The David and Lucile Packard, James Irvine, and William and Flora Hewlett foundations to strengthen grassroots organizations that serve low-income people and communities of color.

Strengthening

COMMUNITIES ADVANCING THE ARTS

The arts in Monterey County are as rich and varied as our famed natural beauty. Nonprofit arts and cultural organizations present dance, music drama, photography, painting, sculpture, video and film. Yet cuts in public funding and the economic downturn have created serious financial strain.

Collectively our greatest challenge remains ensuring that all the communities throughout this vast region have access to quality art and cultural experiences.

For the Community Foundation, the arts are central to our strategic vision of healthy, safe, vibrant communities throughout Monterey County. Since 2004, we have participated as one of 13 community foundations in Communities Advancing the Arts, a multi-year initiative of the James Irvine Foundation aimed at building new sustainable funding streams for the arts in California. Our focus has been on raising the profile of the arts sector and helping arts organizations attract donors and broader community support. This past year we provided grants and technical assistance to 26 arts organizations to help them expand fundraising abilities, increase outreach to donors, and build permanent endowments.

In 2010, we partnered with the Arts Council of Monterey County to rally arts organizations into a stronger creative and economic force. More than 100 artists, art organizations and community partners came together to create an updated Creative Monterey County Action Plan to strengthen the vitality of art experiences and our creative economy. This plan provides a road map for our future investment in securing diverse artistic and cultural experiences for all Monterey County residents.

Gregg Le Blanc / www.CumulusLight.com



*Shakespeare's "Twelfth Night"
Grant funding helped arts organizations like
Pacific Repertory Theatre (above) build and
grow their endowments*



*Youth leaders proudly display the
Community Action Plan*

BUILDING HEALTHY COMMUNITIES

In 2009, The California Endowment embarked on a 10-year initiative, Building Healthy Communities, to support neighborhoods where children and youth are healthy, safe and ready to learn. Our own East Salinas (Alisal) was selected as one of 14 locations with which The California Endowment is partnering. While East Salinas residents face serious challenges, there is a

vibrant and resilient core and its residents' determination make it an ideal candidate to reinvent itself as a healthy community.

The Foundation was chosen by local residents to facilitate a nine-month community-driven planning process that culminated in April 2010 with the presentation of East Salinas' Building Healthy Communities plan to other funders and the wider community. The Plan reflects the vision and wisdom of residents and organizations representing education, health, social services, law enforcement and local leadership. The ultimate goal is to achieve concrete outcomes around neighborhood safety, access to health insurance and youth development, among other goals.

The Foundation has remained a partner with the East Salinas community in moving forward with the plan. We co-funded, along with The California Endowment, the pre-development costs for expansion of the Constitutional Soccer Complex. This will bring much-needed improvements to this important recreational site where Salinas families gather to play and watch soccer on a daily basis. Foundation staff continue to participate in the collaborative project and look for opportunities to invest in supporting implementation of the Plan.

Communities

NEIGHBORHOOD GRANTS PROGRAM

The Neighborhood Grants Program (NGP) provides small grants to neighborhood groups that residents bring together to make their communities more secure and caring. In 2010, NGP awarded \$69,250 in grants to 25 community-based groups throughout Monterey County.

Grants supported such activities as ballet folklorico and other arts programs, youth sports such as basketball and soccer, parent education, and neighborhood improvement projects. Groups were selected based on various criteria, including the merits of their project, organizational capacity, population served and potential community impact.

In addition to financial support, NGP provides on-going technical assistance to its grantees in leadership development, fundraising, planning and membership recruiting. Recent workshops included: Developing a Vision and Mission Statement, Organizational Self-Assessment, Financial Management, How to Open a Group Bank Account and How to Create and Evaluate an Action Plan.

Many of our NGP grantees share the goal of providing more activities for youth, young adults and senior citizens. Through continued support from community and business donations, this year's grantees benefited from having direct access to financial and technical support for the successful completion of their projects and the achievement of their visions of better communities.



Friends of Life Cycle's after school Chess Club at the MLK Elementary School Spring Festival



Learner turned author, Ruben Dozal (r) with attendees at annual literacy conference

LITERACY CAMPAIGN FOR MONTEREY COUNTY

Basic reading and writing skills provide the basis for accessing information and life-long learning. The impact of low literacy levels on the economy and education were two areas that influenced the decision to launch the five-year initiative around adult literacy in 2006. Parents' reading skills and family literacy are critical since parents are their children's first teachers. Literacy is essential in the workplace as an increasing number of jobs require specialized training and more technology-related skills.

The goal of the Literacy Campaign's grantmaking has been to provide people with the basic skills to be successful in their family, work and community. In 2010, \$402,000 in grants was awarded to 12 programs providing basic reading and writing instruction, tutoring and professional development support. Collectively, these programs served 2,910 people — 1,451 adults and their 1,459 children. An impressive 87% of adult learners demonstrated acquired knowledge.

From the beginning, our vision has been to build the local infrastructure to continue literacy promotion and countywide coordination beyond the life of the Foundation's 5-year initiative. The transition to a new sustaining organization is on schedule and we are optimistic that partnerships will grow and more adults will attain the needed skills to succeed at work and at home. For the latest information, visit www.literacycampaignmc.org.

Grantmaking

AWARDS & SCHOLARSHIPS

The Community Foundation administers 31 scholarship and award funds according to the wishes of the fund holders who established them. Here are just a few of the 2010 recipients.

THE DR. LESLIE ELIASON TEACHER OF EXCELLENCE AWARD

This award recognizes outstanding teaching and promotes the professional development of a teacher at the Monterey Institute of International Studies (MIIS) and is made possible by a grant from the Intrepid Philanthropy Foundation.

Professor **Nuket Kardam** of MIIS was granted a sabbatical for the Spring Semester of 2011 to engage in exploring the cultural factors that shape women's leadership roles in Turkey. The Eliason award funds were used for travel and materials to begin a new project titled: *From Ottoman Cosmopolitanism to Turkey's Multiculturalism – Through the Eyes of One Family*. Professor Kardam's research will examine how a nation-state can be successfully maintained while accommodating the rising consciousness of ethnic and religious identities.

THE HARLES R. SARMENT COLLEGE ENDOWMENT FUND SCHOLARSHIP

The Sarment Scholarships were established by the bequest of Mr. Harles Ray Sarment, an elementary school teacher who retired to Monterey County following a long teaching career in Glendale, California. When Mr. Sarment died in 1999, his estate of over one million dollars created The Harles R. Sarment College Endowment Fund of the Community Foundation for Monterey County. Annual Harles R. Sarment College Scholarship grants to graduating seniors in public high schools in Monterey County began in 2001 with nine scholarships of \$1,000 each. The fund has grown, and in 2010, 24 scholarships of \$4,000 each were made available to students who would not otherwise have been able to attend a four-year college or university.



THE DR. WILLIAM D. BARR AWARD FOR EXCELLENCE IN EDUCATIONAL LEADERSHIP

From a fund established in 2006 to honor the retirement of Dr. William D. Barr, the Barr Award is given in recognition of excellence in educational leadership and administration to a graduate student at San Jose State University (SJSU) and to the Association of California School Administrators' (ACSA) Region 10 Superintendent of the Year.

2010 WILLIAM D. BARR RECIPIENTS



Dr. Ralph Gómez Porras,
Superintendent,
Pacific Grove Unified
School District (ACSA)



Jose Gil,
Gil Basketball
Academy, (SJSU)

Impact

ARTS

\$1.24 MILLION TO 117 GRANTEES

\$370,108 from Donor Advised Funds

Youth Orchestra Salinas (YOSAL) is an El Sistema-inspired music program. More than 35 years ago, Dr. José Antonio Abreu's efforts created El Sistema, igniting a revolution in the world of classical music as thousands of students from the most under-served communities of Venezuela began studying music each day after school.

"Whoever creates beauty by playing an instrument and generating musical harmony begins to understand from within what essential harmony is...human harmony."

—DR. JOSÉ ANTONIO ABREU

In July 2010 YOSAL started a classical music ensemble program to bring underserved children together to create an orchestral family. Its six-week summer camp served 40 children aged 8 to 11 years old.

The program expanded to include new students from kindergarten to second grade. Students attend five days a week, two to three hours a day and participation is free, they play in front of audiences as much as possible and presented more than 25 public performances this last school year.

The first year of operation was extremely successful, exceeding all expectations. The program has expanded to more than 120 students so far. School records for students show dramatic improvement and it is clear from testimonials from students, parents and civic leaders that Youth Orchestra Salinas is changing the lives of young people it serves and transforming communities, just as Professor Abreu did in Venezuela.



EDUCATION

\$1.06 MILLION TO 169 GRANTEES

\$173,576 from Donor Advised Funds

Foundation for Monterey County Free Libraries (MCFL)

MCFL received funding to replace the aged and failing South County Bookmobile with a state-of-the-art vehicle. The Bookmobile service is very popular, providing access to library materials and services to many who have no way to make it to the established branches. The Bookmobile visits isolated communities in South County including San Antonio School in Lockwood, Camphora Labor Camp in Soledad and Chualar School. The new vehicle will include a broad selection of books, books on tape, periodicals, and children's books, including Spanish and bilingual materials.

One significant improvement is computers with word processing and internet access for patron use in communities that might not otherwise have access. The mobility of the Bookmobile helps bring literacy services to the underserved rural communities in South County. A pilot project funded by their literacy grant will include literacy tutor training for the Bookmobile staff and literacy program materials for checkout. Staff assists learners on an individual or small group basis as appropriate. By leveraging internet access and other technological resources, staff will be able to help patrons individualize and personalize their learning. Parents or caregivers with a child five years old or younger will be able to participate in the Families for Literacy program, receiving a free book to share with their child.

Grantmaking

ENVIRONMENT

\$213,000 TO 34 GRANTEES

\$141,626 from Donor Advised Funds

Elkhorn Slough Foundation

The Elkhorn Slough watershed stretches from the Pajaro Valley south to Castroville, and from the headwaters in San Benito County west to the Monterey Bay. When it rains within the watershed, water “shed” from the land is carried downhill drop by drop into tributaries, streams, creeks and groundwater eventually making its way into the Elkhorn Slough, and with the outgoing tide, to the

Monterey Bay and Pacific Ocean. The water contains good and bad substances from all the lands it comes in contact with: farms, grazing lands, residential areas and wild lands.

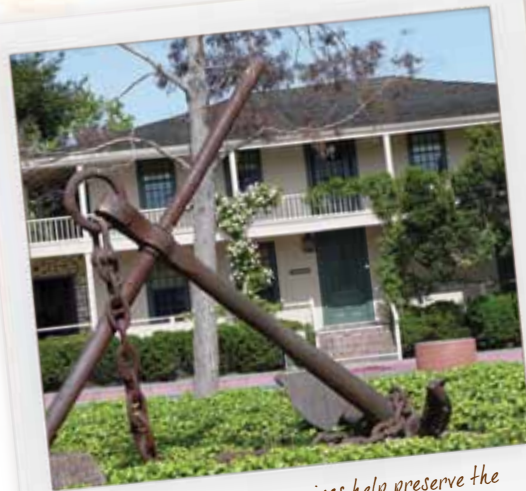


Photo © Robert Syms

Visitors enjoy the beauty of Elkhorn Slough in many ways

In the Elkhorn Slough, freshwater habitats contain diverse communities of plants and animals, including sensitive species such as the Santa Cruz Long-toed Salamander, the California Red-legged Frog and the Southern Pacific Pond Turtle. Unfortunately, these habitats have experienced significant losses over the last 150 years.

Grant funds support their current stewardship projects such as: designing science-based activities to manage and enhance freshwater habitats, maintaining plumbed wildlife watering devices (‘guzzlers’) so they continue to provide habitat for birds, reptiles and mammals, maintaining seasonal water levels in the Reserve’s man-made ponds in order to promote successful breeding and protecting key freshwater habitats from harmful non-native species.



New acrylic window coverings help preserve the irreplaceable collections at the Stevenson House and Larkin House (above)

HISTORIC PRESERVATION

\$63,000 TO 11 GRANTEES

\$10,300 from Donor Advised Funds

Department of Parks & Recreation – Monterey District

The Department of Parks and Recreation, Monterey District (DPR) provides for the health, inspiration and education of the people of California by helping to preserve the State’s extraordinary biological diversity, protecting its most valued natural and cultural resources and creating opportunities for high-quality outdoor recreation.

DPR manages 13 historic venues, all prime Monterey County historic artifacts. Environmental factors such as soot, particles from traffic, UV sunlight, dust and dirt freely enter the buildings, resulting in deterioration of the artifacts and increased staff time to clean and repair damage. In addition, much heat is lost and there is little if any barrier to noise.

A Foundation grant enabled the installation of acrylic window and door coverings in Stevenson and Larkin Houses. These venues were chosen based on the irreplaceable collections they house. DPR researched to find a qualified, experienced vendor who has done similar work (which is agreed upon as a best practice among museums) successfully including Casa Soberanes. The removable acrylic coverings do not replace the existing windows, but are installed on the outside. They nearly eliminate sun damage from UV rays (98%), reduce noise (70%) and the intrusion of dust and street soot (almost entirely), reduce heating costs (up to 40%), stabilize the ambient humidity and reduce staff time needed for cleaning and preservation treatments.

Impact

COMMUNITY AND SOCIAL SERVICES

\$2.22 MILLION TO 223 GRANTEES

\$494,196 from Donor Advised Funds

Ag Against Hunger

Ag Against Hunger is a clearinghouse for surplus crops from the Salinas and Pajaro Valleys that would otherwise go to waste. Their mission is to alleviate hunger by providing the necessary link between the agricultural community and food assistance organizations.

For 21 years, Ag Against Hunger has been uniting growers, farmers, processors and food banks in an effort to reduce hunger and improve the diet of low-income individuals.

They secured, transported, stored and distributed three million pounds of fresh

food from over 50 different growers and shippers in our tri-county area alone during 2010, and as a result helped to feed 158,500 individuals. They engage volunteers from dozens of service organizations, faith communities, and school groups annually to glean the fields. These participants can feel good about being a part of the solution to the growing yet ironic problem of food insecurity in the middle of the "Salad Bowl of the World."

In Monterey County 88,700 hungry people accessed produce through the Food Bank in 2010. This represents 22% of the County's residents. The number of people who require food assistance in Monterey County has more than doubled since 2008 due to increased unemployment and other economic challenges. Local food banks are increasing their demands for fresh produce to offer healthier choices in order to combat obesity and diabetes. This grant helped provide local people in need with the critical components of a healthy diet.



Community members participate in Ag Against Hunger gleaning



Patient receives care at the Big Sur Health Center

HEALTH

\$1.16 MILLION TO 82 GRANTEES

\$262,788 from Donor Advised Funds

Big Sur Health Center (BSHC)

The presence of BSHC is crucial to the welfare of the Big Sur Community. As the only medical facility between the Monterey Peninsula and Cambria, BSHC plays a vital role in the local community by providing high quality acute and preventative health care services that are culturally and linguistically appropriate, affordable and cost-effective. Their mission is to provide comprehensive medical care in Big Sur, regardless of ability to pay. BSHC serves a diverse population of all ages, and last year provided 2,575 patient visits (including home visits for senior citizens).

The grant supported primary and preventative medical services, urgent and emergency care, minor surgical procedures, and Spanish language translation assistance. Direct services include basic laboratory testing, electrocardiograms, specialty lipid counseling, and hospice support. BSHC coordinates with hospitals and doctors on the Monterey Peninsula and in Salinas to facilitate referrals to specialists and also crucial services for children with special needs. They recently launched a new preventative dental program offering exams and cleanings and providing bilingual oral health education to patients and parents. Another effective project has been childhood obesity prevention. The BSHC has also brought about significant changes in local school lunch programs, concentrated on family level nutrition education and successfully integrated information about healthy eating and exercise into the local school curriculum.

Ways to Give

There are many ways to give back through the Community Foundation. We manage 294 funds of all types. For more information, visit www.cfmco.org/types of funds.

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In honor of Ken Wright
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Clarice M. Pruitt

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Michael and Mary Orradre

Out Reach - A Fund for LGBT Life in Monterey County

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Salinas Rodeo Rotary Club

S.T.A.R. Foundation of Monterey County Stewardship Fund

S.T.A.R. Foundation of Monterey County

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William H. and Susanne Tyler, III

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In memory of Priscilla Libby

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In memory of Robert and Doris Jacobs

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People of all ages and abilities enjoy Kernes Memorial Pool. Their new Stewardship Fund will help ensure a strong future.

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Women's Fund of Monterey County, cont.

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Martha Myszak
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Sirie Thongchua
In honor of Roger Champoux
Joanna Champoux
In honor of Dr. Irasema Coronado
Gonzalo Coronado
In honor of Sue Dewar
Mark Boos
**In honor of Wendy Elliott's
50th Birthday**
Joan C. Crenshaw
In honor of Ronda Eubanks
Frank & Denise Quattrone Foundation

In honor of Helen Finigan
Julie Morris
**In honor of the Girls' Health in Girls'
Hands Speakers at the 5th Annual
Women's Fund Breakfast**
Mike and Tobi Marcus
**In honor of Maria Giannini
and Tobi Marcus**
Linda Ford
In honor of Deborah Heyman
Tamar Kaufman Meusel
In honor of Thalia Anne Hubbard
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In honor of Heather Lindstrom
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In honor of Hanako Morris
Jeffrey M. and Amanda Holder
In honor of Grace Ann Morrow
Kelly Ann Morrow
In honor of Konny Murray
Jean Lovell
In honor of Esther Nelson
Krista Hanni
**In honor of Courtney and
Kendall Parker**
Cathy Bright
In honor of Mary Pratt
Claus H. and Alison Pratt Shelling
In honor of Gail Root
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This list represents the complete list of donors to the 2010 campaign. Inevitably, with such a list, an occasional oversight occurs.

If your name has been omitted or there is an error in the listing, we apologize and ask that you notify us at 831.375.9712 or via email at info@cfmco.org.



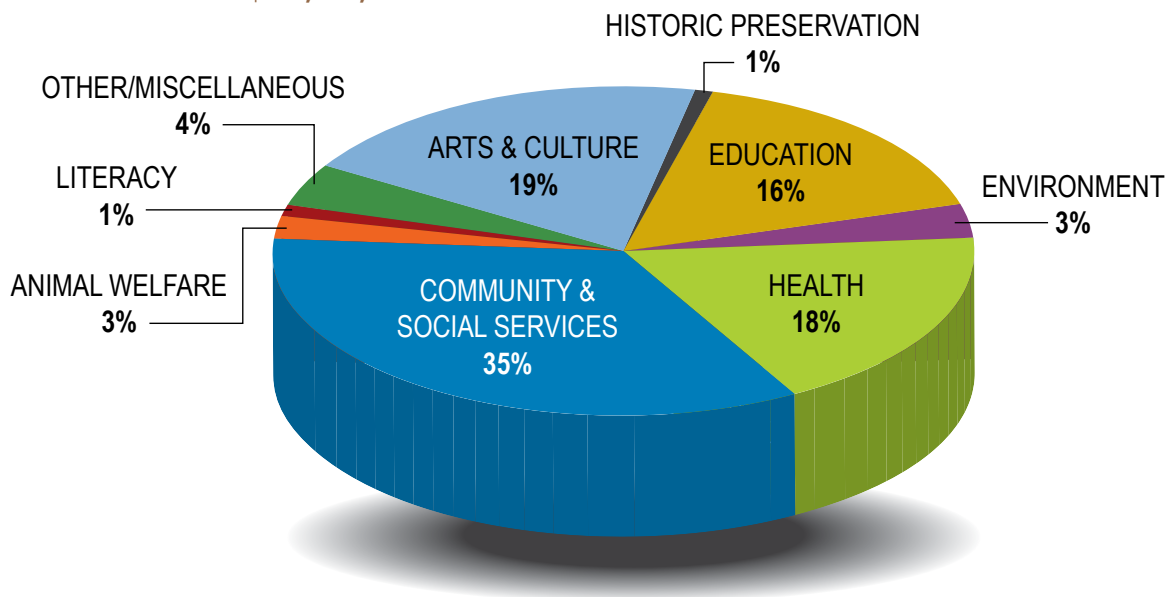
The Arts are the Answer" is the rallying cry of participants in Creative Monterey County: The Action Plan Update

2010 Financial Summary

YEAR END TOTAL ASSETS 2000-2010

2010	\$137,678,876
2009	\$127,477,583
2008	\$102,517,732
2006	\$130,987,266
2004	\$87,723,206
2002	\$63,090,161
2000	\$67,077,409

TOTAL ASSETS \$137,678,876



TOTAL GRANTS FROM ALL FUNDS - \$6,433,499

PROGRAM AREA	COUNT	GRANT AMOUNTS	%
Arts & Culture	117	1,235,593	19%
Community & Social Services	223	2,216,045	35%
Education	169	1,056,346	16%
Environment	34	213,555	3%
Health	82	1,156,187	18%
Literacy	2	60,000	1%
Animal Welfare	22	172,452	3%
Historic Preservation	11	62,678	1%
Other/Miscellaneous	53	260,644	4%
	713	6,433,499	100.00%

COMMUNITY FOUNDATION FOR MONTEREY COUNTY

CONDENSED STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2010

Additions	
Contributions	\$2,603,124
Other income	419,481
Total additions	<u>3,022,605</u>
Investment income	<u>12,674,772</u>
Grants and expenses	
Grants	6,329,049
Other operating expenses	<u>2,776,706</u>
Total grants and expenses	<u>9,105,755</u>
Increase in net assets	6,591,622
Net assets	
Beginning of year	<u>111,137,551</u>
End of Year	<u>\$117,729,173</u>

CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2010

Assets	
Cash and equivalents	\$ 8,879,839
Contributions receivable	2,632,573
Investments, carried at market value	
Mutual funds and equities	97,708,914
Cash and money market funds	7,992,757
Beneficial interest in remainder trusts administered by other trustees	732,484
Assets held in charitable remainder trusts	18,879,952
Equipment, net and other assets	<u>852,357</u>
Total assets	<u>137,678,876</u>
Liabilities and net assets	
Grants payable	827,472
Accounts payable and accrued expenses	453,223
Liabilities under split-interest agreements and charitable remainder trusts	12,882,724
Funds held for others	<u>5,786,284</u>
Total liabilities	<u>19,949,703</u>
Total net assets	<u>\$117,729,173</u>

This condensed Financial Statement was prepared by BBR, LLP based on audited financial statements prepared by them for the year ending December 31, 2010. A copy of the complete audited financial statements or the IRS Form 990 can be obtained at the Foundation's office or online at www.cfmco.org.

Governance

2010 BOARD OF DIRECTORS



BACK (L TO R):

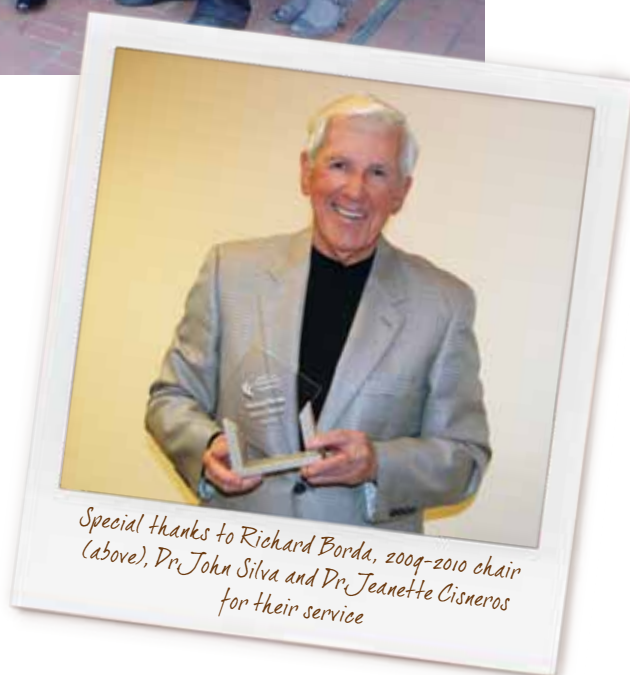
Stephen Dart, Principal, Dart Family Co. Inc.
Craig L. Johnson, investment banker (retired)
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Mark Verbonich, VP Community Affairs, Pebble Beach Company
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Ann Brown, Rancher
Jeri Gattis (Secretary), Community Volunteer
J. Breck Tostevin, CPA (Treasurer), Senior Partner, Tostevin Accountancy Corporation
Tonya Antle, Community Volunteer, VP Earthbound Farms (retired)

NOT PICTURED:

Byrl Anderson-Smith, Peter Coniglio, Paul Bianchi, Jeanette Cisneros, MD, John Silva, MD



*Special thanks to Richard Borda, 2009-2010 chair
(above), Dr. John Silva and Dr. Jeanette Cisneros
for their service*

Stewardship

2010 STAFF



Photo by Beth Cary King

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Jackie Wendland – Senior Program Officer
Tobi Marcus – Director of Resource Development
Julie Drezner – Vice President of Community Engagement
Kaki Rusmore – Director, Organizational and Leadership Development
Ana Paz-Rangel – Administrative Coordinator
Kathy Coopman – Grants and Data Manager
Aurelio Salazar, Jr. – Program Officer, Neighborhood Grants
Julie Conrad – Administrative Services Manager

FRONT:

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Diane Nonella – Director of Finance and Human Resources
Sahlee Rentfrow – Accounting Coordinator
Janet Shing – Program Officer, Community Initiatives
Susie Polnaszek – Program Associate, Organizational and Leadership Development
Amanda Holder – Communications Officer

NOT PICTURED: Deborah Logan, Vice President of Operations

Serving

2010 COMMITTEES

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Jeri Gattis – Secretary, J. Breck Tostevin – Treasurer

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Richard Borda, J. Breck Tostevin

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J. Breck Tostevin

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Jeri Gattis

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Kurt Gollnick, Kelly McMillin



Literacy Campaign board members (back l to r) Carol Kolb, Linda Coyne, Laurel Lee-Alexander, Len Foster (Chair), Leslie Payne, Julie Prezner with Executive Director Marcy Rustad (front left) and CFMC Program Officer Janet Shing

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Sarah Bouchier, Peter Coniglio, Jeri Gattis,
Roberta Huntington, Mark Verbonich, Susan Watts

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Francine Rodd, Linda Sanchez

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Mary Claire Colburn, Mae Johnson, Naomi A. Mustari

In Memoriam



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AYRES**

Fund Holder



**MARGARET
BATES**

Flagg Fund
Board Member



**JACKIE
MACMANUS**

Attorney, Friend of
the Foundation



**MARY JANE
DRUMMOND**

Legacy Society
Member

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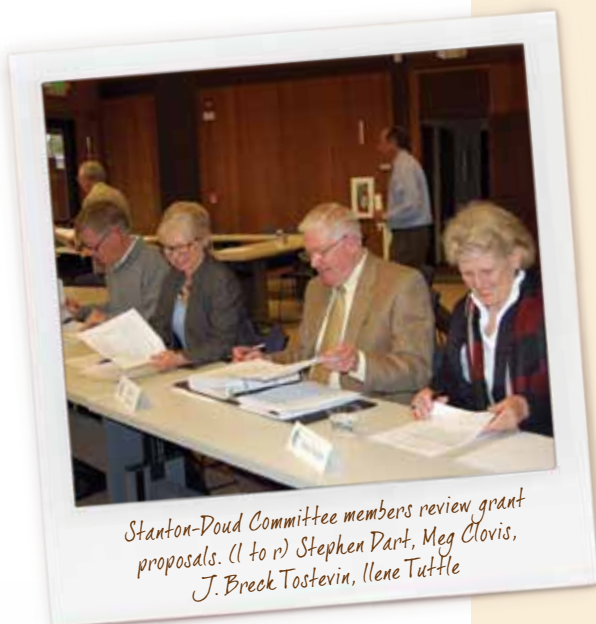
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Fax: 831.375.4731

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Heisinger, Buck & Morris
P.O. Box 5427
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Member, League of California
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