COMMUNITY FOUNDATION
FOR MONTEREY COUNTY

Here for Good

2010 ANNUAL REPORT
Enjoy these snapshots of your Community Foundation as we work towards building healthy, safe, vibrant communities.

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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
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.

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.

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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.

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

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.
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.

“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
Lowell 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 Hawkins
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 Nicolette 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
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.

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.
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.

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).

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.

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.**

“In 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

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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.

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.
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 folklórico 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.

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.

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

Jose Gil, Gil Basketball Academy, (SJSU)
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 underserved communities of Venezuela began studying music each day after school.

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.

“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

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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.

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.

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.

**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.
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.

**Ways to Give**

**Donor Advised Funds**
- Zekei and Carolyn Alcan Fund
- Amy Anderson and George Somero Fund
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- Anonymous Donor Temporary Fund
- Ausonio Family Fund
- Andrew and Victoria Ausonio Family Fund
- Peggy Downes Baskin Fund for Women’s Reentry
- Lino and Teri Belli Family Fund
- Benjamin Fund
- Marta L. Bennett Fund
- Buccafurni-Lawrence Fund
- The Buffett Fund (1 and 2)
- Chappellet Youth, Arts, and Ecology Fund
- Andrew & Phyllis D’Arrigo Fund 2
- Marcia F. DeVoe Fund
- Helen R. Doe Fund
- Doolittle Fund
- Steve Elmer and Kevin Cartwright Fund
- Frances Elgan & Werner Kunkel Fund (1 and 2)
- Howard and Karin Evans Fund
- Davis Factor Jr. Fund (1 and 2)
- Ferrell/Allen Fund
- Doris Parker Fee Fund (1 and 2)
- Ted Fehring Family/Carmel Host Lions Club (1 and 2)
- Lewis and Gloria Fenton Fund
- Jose F. Fernandez Fund
- Matthew Paul Finningar Memorial Scholarship Fund
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- Jessica Govea-Thorbourne Memorial Fund
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- Elmer G. and William G. Hitchcock Fund
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- Cappy Martin/Vernon Hurd Monterey Rotary Club Fund
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- Cynthia Snort Fund
- Robert and Leslie Taylor Fund
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- Monterey County Weekly Community Fund
- Willemsen Family Fund
- Out Reach - A Fund for LGBT Life in Monterey County
- Dr. Frank Pye Smith Medical Facilities Fund
- Robert and Virginia Stanton Endowment Fund
- The James M. and Marjorie E. Sturgeon Fund
- Tri-Counties Blood Bank Fund
- Dr. George & Sam Kh Thongate Family Fund
- Women's Fund of Monterey County Youth Fund

**Designated Funds**
- 39 Craftsmen Fund for Monterey County Youth Museum
- Alert Monterey County Fund
- Alliance on Aging Endowment Fund
- Alzheimer’s Association of Monterey County Arts Council of Monterey County Endowment Fund
- Tony P. and Marjorie Ayres Fund
- The Boys and Girls Club of the Monterey Peninsula Fund
- Nancy Barker Penham Endowment Fund
- David Allen Bernahl II, Local Heroes Fund for CASA
- Big Sur Health Center Endowment Fund
- The Big Sur Land Trust Conservation Fund
- Blind and Visually Impaired Center Fund
- Fred Farr and Edwin Bliss Buckeye Memorial Fund
- Carl Cherry Center for the Arts
- Friends of the Carmel Valley Library Fund
- Carmel Public Library Foundation - Children’s Fund
- Carmel Public Library Foundation Fund
- Carmel Music Society Endowment Fund
- Chertwell School Scholarship Endowment Fund
- Casa Amesti Foundation Building Endowment Fund
- Casa Amesti Garden and House Fund
- Central Coast Lighthouse Keepers Fund
- Chamber Music Monterey Bay Children’s Services International Cislini Fund
- Howard and Lynn Classen Endowment Community Partnership for Youth Fund
- Gloria S. Daly Endowment Fund for All Saints’ Episcopal Day School
- Elkhorn Slough Foundation, Inc. Fund
- Fenton Founders’ Fund for Youth Music Monterey
- Herman Fletcher Fund
- Food Bank for Monterey County Endowment Fund
- A Fork in the Road - A Fund Providing a Path to a Science Career Foundation for Monterey County Free Libraries (General, Dallas Shaffer Book, and Staff Development Funds)
- Rudolph E. Futer Restricted Purpose Fund
- John Gill ALS Patient Support Fund
- Monterey Bay Girl Scout Council Endowment Fund
- Goodwill Industries of Santa Cruz, Monterey and San Luis Obispo Counties Health Projects Center Fund
- Laurie Boone Hogen Appreciation Fund for Excellence in Teaching
- Hudson Fund
- Hester Hyde Griffin Fund for All Saints Day School
- Ward D. and Mary T. Ingrim Fund
- Interim, Inc. Mental Illness Endowment Fund
- Bob Jones Boy Scout Camping Fund
- King City Library Fund
- Kinship Center Fund
- Bishop Kip Fund for All Saints School Legal Services for Seniors Endowment Fund
- LULAC Council # 2055 Fund
- Lycueum Founders’ Fund in Memory of Vera Hering and Claire Kennedy
- John H. Marble Endowment Fund
- Jane P. McKay Endowment Fund for the Big Sur Land Trust Fellowship Program
- Jane P. McKay Endowment Fund for Door to Hope
- Jane P. McKay Endowment Fund for the Hartnell College Foundation Counselors’ Grants Program
- Meals on Wheels of the Monterey Peninsula Fund
- Meals on Wheels of Salinas Inc. Fund
- Eve Mills Memorial Fund for Meals on Wheels Salinas Valley

**Field of Interest Funds**
- Fund for the 21st Century
- Ruth L. and Wilbur K. Amontette Fund
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- Good Neighbor Basic Human Needs Fund
- Gumm Fund for the Performing Arts
- Elmer Mills Harris Fund
- Literacy Campaign Fund
- Todd Luaders Fund for the Arts
- Kathleen and Howard Marks Fund
- McKay Fund
- Engracia Irene Murray Field of Interest Fund
- Margaret L. Musser Field of Interest Fund
- Andrew D. and Marjorie S. Ornick Fund

**Outreach**
- A Fund for LGBT Life in Monterey County
- Dr. Frank Pye Smith Medical Facilities Fund
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Our living Premier Partners have made unrestricted endowment gifts of $25,000 or more.
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Marjorie Chaney
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Sharon L. Dalkey
In honor of Wolfgang Haas
Robert Haas
In honor of Michael Stamp and Molly Erickson
David S. Sabih

Amy Anderson and George Somero Fund
Amy Anderson and George Somero

Tony P. and Marjorie Ayres Fund
In memory of Marjorie Ayres
Ralph and Diane Costa Gabler
Marybelle Defelbush
Tony and Agnes Marie Dilil
Placido and Mary Ann Forestier
Rogers and Frances Fulton
Giving Back

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The Arts are the Answer” is the rallying cry of participants in Creative Monterey County: The Action Plan Update
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<th>Total Assets</th>
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<tr>
<td>2010</td>
<td>$137,678,876</td>
</tr>
<tr>
<td>2009</td>
<td>$127,477,583</td>
</tr>
<tr>
<td>2008</td>
<td>$102,517,732</td>
</tr>
<tr>
<td>2006</td>
<td>$130,987,266</td>
</tr>
<tr>
<td>2004</td>
<td>$87,723,206</td>
</tr>
<tr>
<td>2002</td>
<td>$63,090,161</td>
</tr>
<tr>
<td>2000</td>
<td>$67,077,409</td>
</tr>
</tbody>
</table>

TOTAL ASSETS $137,678,876

- **Arts & Culture**: 19%
- **Community & Social Services**: 35%
- **Education**: 16%
- **Health**: 18%
- **Environment**: 3%
- **Historic Preservation**: 1%
- **Other/Miscellaneous**: 4%
- **Literacy**: 1%
- **Animal Welfare**: 3%

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

<table>
<thead>
<tr>
<th>Program Area</th>
<th>Count</th>
<th>Grant Amounts</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Culture</td>
<td>117</td>
<td>1,235,593</td>
<td>19%</td>
</tr>
<tr>
<td>Community &amp; Social Services</td>
<td>223</td>
<td>2,216,045</td>
<td>35%</td>
</tr>
<tr>
<td>Education</td>
<td>169</td>
<td>1,056,346</td>
<td>16%</td>
</tr>
<tr>
<td>Environment</td>
<td>34</td>
<td>213,555</td>
<td>3%</td>
</tr>
<tr>
<td>Health</td>
<td>82</td>
<td>1,156,187</td>
<td>18%</td>
</tr>
<tr>
<td>Literacy</td>
<td>2</td>
<td>60,000</td>
<td>1%</td>
</tr>
<tr>
<td>Animal Welfare</td>
<td>22</td>
<td>172,452</td>
<td>3%</td>
</tr>
<tr>
<td>Historic Preservation</td>
<td>11</td>
<td>62,678</td>
<td>1%</td>
</tr>
<tr>
<td>Other/Miscellaneous</td>
<td>53</td>
<td>260,644</td>
<td>4%</td>
</tr>
</tbody>
</table>

| Total                        | 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**

<table>
<thead>
<tr>
<th>Additions</th>
<th>$2,603,124</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$2,603,124</td>
</tr>
<tr>
<td>Other income</td>
<td>419,481</td>
</tr>
<tr>
<td><strong>Total additions</strong></td>
<td><strong>3,022,605</strong></td>
</tr>
</tbody>
</table>

| Investment income          | 12,674,772 |

<table>
<thead>
<tr>
<th>Grants and expenses</th>
<th>9,105,755</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>6,329,049</td>
</tr>
<tr>
<td>Other operating expenses</td>
<td>2,776,706</td>
</tr>
<tr>
<td><strong>Total grants and expenses</strong></td>
<td><strong>9,105,755</strong></td>
</tr>
</tbody>
</table>

| Increase in net assets     | 6,591,622  |

<table>
<thead>
<tr>
<th>Net assets</th>
<th>$117,729,173</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of year</td>
<td>111,137,551</td>
</tr>
<tr>
<td>End of Year</td>
<td><strong>$117,729,173</strong></td>
</tr>
</tbody>
</table>

### CONDENSED STATEMENT OF FINANCIAL POSITION AS OF DECEMBER 31, 2010

<table>
<thead>
<tr>
<th>Assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and equivalents</td>
<td>$8,879,839</td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>2,632,573</td>
</tr>
<tr>
<td>Investments, carried at market value</td>
<td></td>
</tr>
<tr>
<td>Mutual funds and equities</td>
<td>97,708,914</td>
</tr>
<tr>
<td>Cash and money market funds</td>
<td>7,992,757</td>
</tr>
<tr>
<td>Beneficial interest in remainder trusts administered by other trustees</td>
<td>732,484</td>
</tr>
<tr>
<td>Assets held in charitable remainder trusts</td>
<td>18,879,952</td>
</tr>
<tr>
<td>Equipment, net and other assets</td>
<td>852,357</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>137,678,876</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities and net assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants payable</td>
<td>827,472</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>453,223</td>
</tr>
<tr>
<td>Liabilities under split-interest agreements and charitable remainder trusts</td>
<td>12,882,724</td>
</tr>
<tr>
<td>Funds held for others</td>
<td>5,786,284</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>19,949,703</strong></td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>$117,729,173</strong></td>
</tr>
</tbody>
</table>

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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](http://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)
Thomas P. Bohnen, Esq., Bohnen, Rosenthal & Dusenbury
Mark Verbonich, VP Community Affairs, Pebble Beach Company
Kurt Gollnick (Vice-Chair), Chief Operating Officer, Scheid Vineyards
The Honorable John M. Phillips (retired),
President Rancho Cielo Youth Campus
Alfred Diaz-Infante, President/CEO CHISPA
Kelly McMillin, Deputy Chief, Salinas Police Department

FRONT (L TO R):
Sarah Bouchier, Carmel Realty Company
Jim Bogart, President, Grower-Shipper Association
Gail Delorey, CPA, Managing Partner, Bianchi, Kasavan & Pope, LLP
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
Stewardship
2010 STAFF

BACK:
Dan Baldwin – President/CEO
Deirdre Dineen – Administrative Assistant
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:
Kathryn Hart – Development Associate
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

BOARD COMMITTEES

Executive Committee
Richard Borda – Chair, Kurt Gollnick – Vice Chair,
Jeri Gattis – Secretary, J. Breck Tostevin – Treasurer

Audit Committee
Kurt Gollnick – Chair, Paul Bianchi, Tom Bohnen,
Richard Borda, J. Breck Tostevin

Grants and Programs Committee
Jeanette Cisneros – Chair, Byrl Anderson-Smith,
Richard Borda, Ann Brown, Peter Coniglio, Jeanne
Landreth, Kelly McMillin, John Silva, Mark Verbonich

Investment Committee
Craig Johnson – Chair, Richard Borda, William Doolittle,
David Benjamin, Eric Miller, Roberta Elliott,
J. Breck Tostevin

Facilities Committee
Sarah Bouchier – Chair, Richard Borda, Jim Gattis,
John Mahoney

Nominating Committee
Kurt Gollnick – Chair, Richard Borda, Sarah Bouchier,
Jeri Gattis

Personnel Committee
Jim Bogart – Chair, Richard Borda, Alfred Diaz-Infante,
Kurt Gollnick, Kelly McMillin

Resource Development Committee
Tom Bohnen – Chair, Paul Bianchi, Richard Borda,
Sarah Bouchier, Peter Coniglio, Jeri Gattis,
Roberta Huntington, Mark Verbonich, Susan Watts

ADVISORY COMMITTEES

Community Leadership Project
Kathryn Badon, Erica Padilla Chavez, Jeanette Cisneros,
Alfred Diaz-Infante, Reyna Navarrete, Seth Pollack,
Francine Rodd, Linda Sanchez

Doud Fund Committee
Mary Wright – Chair, Richard Borda, Meg Clovis, Ilene Tuttle

Flagg Fund Board of Directors
Ryan Flagg – Chair, Byrl Anderson Smith, Margaret P. Bates
– Member Emeritus, Richard Borda, Sarah Bouchier,
Mary Claire Colburn, Mae Johnson, Naomi A. Mustari

In Memoriam

MARJORIE AYRES
Fund Holder

MARGARET BATES
Flagg Fund
Board Member

JACKIE MACMANUS
Attorney, Friend of
the Foundation

MARY JANE DRUMMOND
Legacy Society
Member
ADVISORY COMMITTEES, CONTINUED

LEAD Institute Advisory Committee:
Nina Alcarez, Gary Byrne, Christina Cuevas, Karen Csejtey, Chris Hasegawa, Laura Kasa, Stella Lauerman, Barbara Mitchell, Reyna Navarette, Sue Parris, Jan Phillips Paulsen, Joy Rubey, Blanca Tavera

Literacy Steering Committee
Diane Cordero de Noriega – Chair, Mary Adams, James Bogart, Pam Dozier, Mary Ellison, Linda English, Len Foster, Jeanne Herrick, Laurel Lee-Alexander, Irene Naes-Guzicki, Leslie Payne, Yvonne Ricketts, Elliott Robinson, Francine Rodd

Robert and Virginia Stanton Endowment Committee
Ramona Smith – Chair, Richard Borda, Stephen Dart, Kip Hudson, Gordon Paul Smith, Member Emeritus, J. Breck Tostevin

Neighborhood Grants Committee
Board Liaison: Judge John Phillips (Ret.)
Community Liaisons: Brielle Bumba, Linda Coyne, Jaqueline Cruz, Elsa Estrada, Ana Fowler, Lupita Garnica, Omar Murrillo, Carissa Purnell, Celina Trujillo

Women’s Fund Grants Committee
Tonya Antle, Barbara Babcock, Vivian Brennand, Kim Bui-Burton, Aimee Burke, Kevin Cartwright, Julie Cason, Lisa Crawley, Ericka Engelman, Ronda Eubanks, Anne Fitzpatrick, Jeri Gattis, Kathryn Harrison, Petie Helfrich, Konny Murray, Felicia Perez Kausin, Traci Townsend

Women’s Fund Leadership Council
Wendy Elliott – Chair, Vivian Brennand, Ann Brown, Kim Bui-Burton, Joan Crenshaw, Karen Csejtey, Ronda Eubanks, Jeri Gattis, Felicia Perez Kausin, Kate Daniels Kurz, Konny Murray, Cathy Schumbrecht, Traci Townsend, Jacqueline Wolf

Real Estate Advisory Committee
Sarah Bouchier – Chair, Tom Bohnen, Richard Borda, Christine Chin, John Mahoney, Sidney Morris, William Mitchell

Social Network Support Advisory Team
Ruth Buell, Judy Burditt, Rose Colon, Anna Foglia, Pat Clark-Gray, Dawn Hayes, Kelly McMillin, Bob Reyes, Mara Wold