

Your Partner in Philanthropy



(l to r) Dena and Joel Gambord recently created a fund "The Joel and Dena Gambord Charitable Foundation" with all the benefits of a private foundation

We often refer to the Community Foundation for Monterey County (CFMC) as "your partner in philanthropy." What does that mean? We work with each individual, family and business to provide a road map to fulfill their philanthropic vision. We act as a catalyst, providing a bridge between our fund holders and the needs of the community.

Staff has in-depth knowledge about the range of nonprofits working to make our communities stronger. The CFMC offers a wide range of giving options to support the agencies of your choice, including donor advised funds, charitable gift annuities, charitable remainder trusts and more. What also sets us apart is the personal service we provide and our interest in creating the greatest good for Monterey County, now and in the future.

Recently Joel and Dena Gambord chose to partner with the CFMC to fulfill their vision of reducing the wait for those in need of service dogs. They support nonprofit organizations training hearing dogs,

diabetic alert dogs, psychological support dogs for wounded veterans and search and rescue dogs that assist emergency first responders.

The CFMC facilitated the transition from a private foundation to the Joel and Dena Gambord Charitable Foundation at the Community Foundation for Monterey County.

Staff assisted with defining the giving goals, developed grantmaking procedures, conducted due diligence on potential grantees and created a custom webpage. CFMC staff will also conduct site visits and facilitate a meeting with the family to grant this year's distribution. The Gambords feel that the experience has been very positive. Joel says, "I love the 'can do' attitude at the CFMC."

Recently we expanded our capabilities to offer even more options for the donor community.

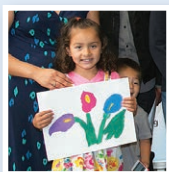
Private Foundation Services We now provide a full menu of administrative service options to private foundations—grantmaking consultation and support, research and due diligence, site visits, accounting services and more—all while you retain your foundation identity. Services can be tailored to meet the needs of each foundation, reducing the administrative burden and maximizing charitable giving.

Corporate Funds These funds offer custom services to help your company plan, govern and operate your corporate giving program. The CFMC provides a range of grantmaking support, from research and proposal screening to the distribution and tracking of grant checks customized with your company name. You take advantage of the ease of working through a fund at the CFMC and you focus on your core business. Please give us a call at 831.375.9712 to learn how the CFMC can be your partner in philanthropy.

I love the 'can do' attitude at the CFMC.

— JOEL GAMBORD, JOEL AND DENA GAMBORD CHARITABLE FOUNDATION

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LEAD Grows “LEADers”

The fourth class of nonprofit “LEADers” graduated September 6, 2013 from the LEAD (Leadership Education and Development) Institute of the CFMC’s Center for Nonprofit Excellence. Seventeen nonprofit professionals from Monterey, San Benito and Santa Cruz counties gained significant new abilities and enhanced their capacity to provide



2012/2013 LEAD Cohort graduates

leadership in their present positions and move towards greater leadership roles in the future. They praised their coaching, the connections made and the entire LEAD experience. The graduates are looking forward to bringing their new skill set to their organizations to make a difference in their communities. More than 70 local leaders have completed the program.

To see the list of graduates visit www.cfmco.org/lead.

“I have discovered personal strengths that I wasn’t aware of and learned not only how to be a stronger person, but also how to communicate and lead others to get people to commit to a good cause,” said Isabel Valtierra of Monterey County Office of Education Head Start & Early Head Start.



Ben Bruce of Community Partnership for Youth spoke about the impact of the LEAD coaches

PRESIDENT’S MESSAGE

Deepening Donor Relationships

For many years community foundations emphasized the value they brought to philanthropic relationships with their fund holders. Deep knowledge of local nonprofits. Matching fund holder interests with good projects. Understanding emerging needs. All of those attributes were communicated with sincerity, and certainly delivered in some instances, but few community foundations created programs or staff positions that embedded these ideas in their work systems.

The CFMC is committed to facilitating our donors’ philanthropic vision. In early 2012, the CFMC created a new staff position, Philanthropic Services Officer, with the intention of delivering on these promises. This position became the primary point of contact for our fund holders. We researched grant histories and trends for every donor advisor. Developed a welcome packet for new fund holders. Subscribed to DonorCentral, our on-line donor advising system. Earlier this year we shared, for the first time, a digest of Community Impact grant applications with donor advisors so they could learn more about agency work in Monterey County, and make grant investments that align with our Community Impact grant program. Our fund holders partnered with us to provide more than \$250,000 additional grants to these opportunities.



Dan Baldwin, CFMC President/CEO at Celebration of Philanthropy

“The CFMC is committed to facilitating our donors’ philanthropic vision. —DAN BALDWIN, CFMC PRESIDENT/CEO

We are now seeing such robust results from philanthropic services that we are presenting two new initiatives to support Monterey County philanthropy: corporate donor advised funds and services to private foundations.

Corporations are often inundated with grant requests. Larger organizations, such as national banks with local branches, typically have the backing of a corporate foundation and local giving policies. However, many successful family-owned businesses face the same “giving pressure” but don’t have “giving infrastructure” inside their shops. So their philanthropy, what should be a rewarding experience, becomes a headache. The CFMC can relieve this headache by helping companies define their giving priorities, provide structure, accept grant applications, and, if requested, assist with the decision-making process.

A similar situation exists with family and private foundations. Many foundations are formed by one generation then passed to the next (and the next, etc.). The values of the founders, or the zeal they had for the foundation, may not be shared by successor generations. Sometimes the founding generation realizes the burden they might be placing on their children and grandchildren, so pass along the oversight to an attorney or financial advisor. In any of these scenarios, the CFMC can provide administrative support, work with foundation leadership to define a scope of giving and lend expertise to grantmaking.

Engagement with donors has always been a hallmark of the CFMC. Having learned ways to deepen donor relationships, we look forward to broadening the range of philanthropists with whom we can partner. — Dan Baldwin

CFMC Celebrates Philanthropy

Warren Wayland honored with Distinguished Trustee Award



Friends and supporters gathered to celebrate philanthropy

Part of the mission of the CFMC is to "Inspire Philanthropy." This was on display at the annual Celebration of Philanthropy held October 10 at Corral de Tierra. Nearly 300 supporters came to mingle with friends and honor Warren Wayland, the 2013 Distinguished Trustee Award recipient.

Guests enjoyed entertainment by Monterey Jazz Festival High School

All-Star musicians, hors d'oeuvres, and wine donated by Scheid Vineyards. President/CEO Dan Baldwin announced that assets were at a record high \$165 million and the CFMC is on track to surpass the record \$9 million granted last year. He thanked the CFMC board, donors, professional advisors and nonprofits for their partnership in making these accomplishments possible.

The highlight of the evening was the presentation of the Distinguished Trustee Award to Warren Wayland.

Wayland, co-founder of Hayashi and Wayland and a past Treasurer of the CFMC board, was honored for his lifetime of commitment to

charitable causes. He strengthens our community through his vision, generous giving and dedicated community involvement for youth sports, especially as Salinas Sports Complex and new Rabobank Stadium Project Chairman.

He has received Citizen, Cattleman and Junior Achievement Laureate of the Year honors in addition to the Jefferson Award and the CFMC Distinguished Trustee Award. As the award recipient, he was able to direct a CFMC grant of \$10,000 to Public Recreation Unlimited for the stadium. He also received a signed Joe Montana jersey as a special gift.



(l to r) Dan Baldwin, chair Ann Brown, honoree Warren Wayland

Current CFMC board member Ken Wright greets former board member Tom Bohnen

Joy Dunn, The Salinas Californian



Outgoing Board Members Honored

Chair Ann Brown recognized outgoing board members who are ending their terms in 2013 for their dedication and commitment to the CFMC. Over the past 6 years, each one's passion and expertise has contributed greatly to the board. They will be missed!

Sarah Bouchier

Jeri Gattis (Vice-Chair)

Kurt Gollnick (Chair 2011)

Craig Johnson (Chair 2012)

Mark Verbonich



(l to r) Craig Johnson, Sarah Bouchier, Mark Verbonich (Not pictured: Jeri Gattis, Kurt Gollnick)

Richard Green

Women's Fund — Changing Lives of Women and Girls



(l to r) Girls' Health in Girls' Hands mentors Roxanna Sanchez, Jeanette Corona, Natalie Garcia Lopez and Ilyanna Rose

We believe that economic prosperity for women is essential to the health and vitality of our entire community. The Women's Fund's grants program in 2013 was directed exclusively towards advancing this goal.

A total of \$75,000 was granted for projects addressing educational support, business development assistance and women's economic self-sufficiency. The ten grantee organizations were: The Community Human Services, Girls, Inc. of the Central Coast, Go Kids, Inc. Hartnell College Foundation, Monterey Peninsula College Foundation, Natividad Medical Foundation, Castro Plaza Family Resource Center/ North Monterey County Unified School District, Salinas Public Library, Sun Street Centers, and The Village Project, Inc.

The Women's Fund of Monterey County is one of the 93 participating nonprofits in the Monterey County Gives! Program of the Monterey County Weekly's Community Fund. Your donation to www.montereycountygives.com between November 14 and December 31st will receive a pro-rata match. (See p. 8)

FUND HOLDER PROFILE

Monica Abbott — An Inspiration On and Off the Field

Monica Abbott is inspiring on many levels. She is an Olympian. A professional athlete. A local girl made good. Most impressive is her commitment to give back to local female student athletes through academic scholarships. Her generous spirit shone through as she met with the first two recipients of the Monica Abbott Scholarship Fund.

Monica felt the support of local fans that followed her softball career on the sports pages from North Salinas High School through the University of Tennessee, as a medalist at the 2008 Olympics and member of the two-time world champion USA National Team. She now plays professionally with the Toyota Motor Corporation in the Japan Softball League and for the champion Chicago Bandits in the National Pro Fastpitch league where she is three-time Pitcher of the Year. In her spare time, she travels the country putting on clinics and doing motivational speaking.

"I was looking for a way to give back to my hometown in a permanent, personal way. I thought one of the best ways would be through establishing a scholarship. Education can help a lot of these kids. I worked my entire life and the only way I could go to college was through a scholarship," said Monica. "It's important to me not just that they (recipients) play a sport or have a good GPA, but that they show dedication and drive to their sport and community. I wanted to give someone a step up, a little help," she added.

Monica was referred to the CFMC by her professional advisor, Steve Merrill of Monterey Private Wealth



CFMC fund holder and Olympian, Monica Abbott, (center) congratulates her first scholarship recipients, Riley Ashen (l) and Cassandra Zazueta (r)

Richard Green

**I wanted to give someone a step up,
a little help** —MONICA ABBOTT

Management. She established the Monica Abbott Scholarship Fund in 2012. Riley Ashen of North Salinas High School and Cassandra Zazueta of Everett Alvarez High School were the first recipients. Monica was able to meet and encourage them one week prior to their departure for their freshman year at Sacramento State University. Each received \$1,000.

In 2014 all public Monterey County High Schools will be invited to nominate an applicant. Monica's vision is to grow the fund and ultimately provide full scholarships. At age 28 she is the youngest person to ever create a fund at the CFMC. She is an inspiration by any measure.

To contribute or learn more, visit www.cfmco.org/abbott or www.monicaabbott.com.



Amara Holder

(l to r) Sharen Carey, Executive Director of the Big Sur Health Center, and donor Patricia Lee Pavey present check to Dan Baldwin to launch the Big Sur Health Center Stewardship Fund. Pavey created the fund to inspire others to donate to assure that quality healthcare would always be available in the Big Sur community, now and into the future.

NEW FUNDS ESTABLISHED*

DONOR ADVISED

Howard and Karin Evans Fund
The Joel and Dena Gambord Charitable Foundation
F. Robert Nunes Family Fund
Peter and Anne Thorp Fund

AGENCY FUNDS

Big Sur Health Center Stewardship Fund
Carmel Valley Kiwanis Stewardship Fund
Central Coast Veterans Cemetery Capital Campaign Fund
Central Coast VNA and Hospice, Inc. Stewardship Fund
Monterey County Rape Crisis Center Stewardship Fund

The CFMC manages more than 300 funds established by individuals, families and businesses. To learn more, please contact Christine Dawson at 831.375.9712 x126 or visit www.cfmco.org.

*Since May 2013

COMMUNITY LEADERSHIP PROJECT

More than \$1 million granted to nonprofits

Fourteen small nonprofits in Monterey, San Benito and Santa Cruz counties are getting significant support to meet the needs of local residents. They were awarded a total of \$1,120,000 in grants through the Community Leadership Project of the Central Coast (CLP).*

The agencies, which serve low-income populations and people of color, will receive \$80,000 each over three years.

The CLP grantees will receive training, peer learning and coaching to help strengthen their leadership and financial management while helping them achieve organizational goals. The nonprofits are working with their mentors to finalize a three year plan to improve services.

"The collaboration among the groups and across counties will help all of us work in a more networked and powerful way," said Julie Drezner, CFMC Vice President of Grants and Programs.

MONTEREY COUNTY

Alisal Center for Fine Arts, East Salinas
Big Sur Health Center, Big Sur
Community of Caring Monterey Peninsula, Monterey
Loaves, Fishes & Computers, Marina
Sol Treasures, King City
The Village Project, Seaside

SAN BENITO COUNTY

CASA of San Benito County, Hollister
Community Food Bank, Hollister
Homeless Coalition of San Benito County, Hollister

SANTA CRUZ COUNTY

COPA, Watsonville
Conflict Resolution Center, Santa Cruz
Pajaro Valley Arts Council, Watsonville
The Watsonville Law Center, Watsonville
YWCA of Watsonville, Watsonville

*The CLP is a collaboration between the CFMC, Community Foundation Santa Cruz County and the Community Foundation for San Benito County. The CLP is funded by The David and Lucile Packard Foundation, The James Irvine Foundation and The William and Flora Hewlett Foundation as part of their larger Community Leadership Project initiative to strengthen small nonprofit organizations serving low-income people and communities of color in the San Francisco Bay Area, San Joaquin Valley and the Central Coast.



Nonprofit managers and board members from the six Monterey County grantees gathered at first CLP convening in Moss Landing

Richard Green

Neighborhood Grants Empower Grassroots Groups

The power of community was in full force in the energy and variety of the 26 groups represented at the 16th Annual Neighborhood Grants Program (NGP) Awards Ceremony held August 27 at Hartnell College in Salinas. The CFMC recognized resident-led groups whose volunteers have demonstrated exemplary action to improve the safety, well-being, and overall quality of life in their neighborhoods.

This year's recipients range from parent and volunteer-led arts, education, sports and safety programs, to neighborhood improvement associations, community gardens and support groups.

The groups received an average of \$3,000 each and additional assistance to organize ongoing activities in their respective communities. The total granted was \$77,500.

"From these small grants to grassroots groups to our larger Community Impact grants to nonprofit organizations, the CFMC is committed to strengthening communities throughout the County of Monterey," said Aurelio Salazar Jr., CFMC Program Officer.

NGP grant recipients Valley of Artists (Greenfield)



Richard Green

Grant Information Sessions & Evaluation Clinics

Community Impact Grant RFP Deadline: February 7, 2014



Grant Information Sessions

Grant information sessions will highlight new revisions to the Community Impact Grantmaking Framework. Nonprofit organizations

considering submitting a grant application for the February 7, 2014 deadline for "Investing in Our People" (Building Blocks and Wellness) are encouraged to attend one of the following sessions:

December 4, 2013, 3:30–5:00 PM
King City Library, 402 Broadway

December 10, 2013, 3:30–5:00 PM
CFMC Salinas, 945 S. Main Street

December 12, 2013, 3:30–5:00 PM
CFMC Monterey, 2354 Garden Road

Grant Evaluation Clinic

Learn how to craft your impact evaluation for more successful grant application and results.

January 8, 2014, 5:30–7:00 PM
CFMC Monterey, 2354 Garden Road

January 9, 2014, 3:30–5:00 PM
CFMC Salinas, 945 S. Main Street

Due to limited space, advance registration is required at www.cfmco.eventbrite.com.

Questions? Call 831.375.9712 or visit www.cfmco.org/communityimpact.

OTHER IMPORTANT DATES:

December 5, 2013
Advanced Grant Proposal Writing Workshop

January 31, 2014 Application Deadline
Stanford Alumni Consulting Group

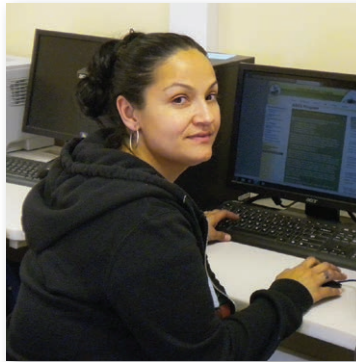
Visit www.cfmco.org/cne for more information.

GRANTMAKING

Here are just a few examples of grants where funding is making a meaningful difference for many people and communities throughout Monterey County. To see more grants in each impact area, please visit www.cfmco.org/grantsandsupport.

Castro Plaza Family Resource Center

Women's Fund grant — \$10,000 for economic self-sufficiency



Laura Garcia

Student uses computer for college homework thanks to the "Supporting Women of North Monterey County to Higher Education" program

The Castro Plaza Family Resource Center, located in the center of downtown Castroville, is a one-stop center for families in Northern Monterey County. It offers child development programs, parenting assistance and additional support services to help families thrive. The Center's Supporting Women of North Monterey County to Higher Education program was selected as one of the Women's Fund's ten funded projects in 2013 that give women the support they need to pursue educational goals as a pathway towards economic

prosperity. The Castro Plaza program will provide low-income women who are enrolled in college with child care subsidies and the financial support for transportation, books and other help they may need to make their educational dreams a reality.

South Monterey County Memorial Hospital

(dba Mee Memorial Hospital)

Wellness grant — \$16,000 for diabetes education programs

In the community conversations recently held by the Monterey County Health Department (as part of its strategic planning process) common themes were heard from all areas of the county around diabetes, obesity and access to health care.

A grant was made to Mee Memorial Hospital in King City to support the one-time start-up costs of a new diabetes education and self-management program, and paid for American Association of Diabetes Educators' tracking system, accreditation fee, educational tools and training. With a certified diabetes educator, the hospital will be able to serve a minimum of 100 new people a year with bilingual education classes and resources. In addition, the hospital will be able to be reimbursed for these new services, thus setting the stage for long-term success where additional people access health resources under a financially viable program.



Suzi Taylor

(l to r) Adrienne Starr RDN,CSG and Barbara Horne RDN,CSG review materials for the Diabetes Self Management and Prevention Center at Mee Memorial Hospital

IMPACT

Royal Presidio Chapel Foundation

Opportunity grant — \$5,000 for website development



RPCF's new website will introduce preservation activities that underscore the historical significance of this local gem

San Carlos Borromeo de Monterey was founded by Father Junipero Serra on June 3, 1770. The present sandstone church, California's first cathedral, was completed in 1794 and is the oldest continuously functioning church and the first stone building in the State of California. The Royal Presidio Chapel Foundation (RPCF) is an independent nonprofit organization formed to protect this community treasure. An \$8 million restoration of the cathedral

was completed in 2009. RPCF provides key funding to preserve this landmark, covering special projects and costs related to historic preservation. An organizational development grant was given to help this group get started, including developing a website, www.royalpresidiochapel.foundation.org, which is under development.

Big Sur Land Trust – in collaboration with Monterey Jazz Festival

Arts & culture grant — \$20,750 to provide summer camp for Salinas Valley youth

While the Big Sur Land Trust (BSLT) is well-known for conserving the significant lands and waters of the central coast, they have updated their mission to “inspire love of the land and conservation of our treasured landscapes.” This shift in focus has led to more programming to connect people, especially youth, to the land. The CFMC funded a collaborative summer camp, with programming support from Monterey Jazz Festival and Ventana Wildlife Society and participants from Girls, Inc., South County YMCA and CHISPA, to inspire youth through nature and self-expression. The two-day overnight camps took place in Big Sur and activities included nature hikes, journaling, historical storytelling, and rhythm clinics with Marcie Chapa, percussionist for Beyoncé. This inaugural year was a great success and BSLT looks forward to growing the program in the future to offer more programs to inspire our county's youth.



Salinas Valley girls at Glen Deven Ranch in Big Sur participate in a drumming circle with percussionist Marcie Chapa – a collaborative camp project with Monterey Jazz Festival and Big Sur Land Trust



“Everything is natural here, quiet, peaceful, and is really calm, which is really unusual for me. Even right now as I was writing an ant crawled on my finger. I saw how it was cool, natural and very harmless. I look forward to...relaxing here.” — SUMMER CAMP PARTICIPANT

Steve McGowan Joins Board

The CFMC recently welcomed Steve McGowan to its board of directors. Mr. McGowan, presently retired, is the former chief financial officer and executive vice president of corporate resources for Sun Microsystems, Inc.



BOARD OF DIRECTORS

Ann T. Brown, *Chair*
Jeri Gattis, *Vice Chair*
Rick Kennifer, *Secretary*
Gail Delorey, *Treasurer*
Tonya Antle
Sarah Bouchier
Greg Chilton
Jim Claypool
Stephen Dart
Alfred Diaz-Infante
Kurt Gollnick
Craig Johnson
Catherine Kobrinsky Evans
Tina Starkey Lopez
Steve McGowan
Kelly McMillin
Ken Petersen
John M. Phillips
Anna Marie Ponce
Mark J. Verbonich
Kenneth R. Wright

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www.cfmco.org
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Here for Good
**Community
Foundation**
for Monterey County



Richard Green

Neighborhood Grants support grassroots groups like the Monterey Bay Lion Dance Team (See page 5)



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INSIDE

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COMMUNITY LEADERSHIP PROJECT
STORIES OF IMPACT

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Make the Most of Year-End Giving



Richard Green

Have you thought about your giving goals for this year? Your goals may look like this: increase my income, lower my taxes, support my favorite nonprofit. Contact us at 831.375.9712 or visit www.cfmco.org to learn more about how the CFMC can help you realize your goals.

Leverage Your Donation

MONTEREY COUNTY gives! 2013

Supporting big ideas from local nonprofits

A project of the Monterey County Weekly Community Fund

Give back to the participating nonprofit(s) of your choice through the Monterey County Gives! 2013 campaign. Visit www.montereycountygives.com between November 14 and December 31, 2013 to make a tax deductible donation to up to 93 nonprofits with big ideas.

Donations will receive a portion of a \$100,000 pro-rata match from the Monterey County Weekly Community Fund. A record \$751,150 was given in 2012 and \$2.9 million has been raised since the campaign's inception in 2000.

The Monterey County Weekly Community Fund is a donor advised fund of the Community Foundation for Monterey County. The match is made possible by key support from the David and Lucile Packard Foundation and Neumeier Poma Investment Counsel, partnering with the CFMC and the Weekly.

Take Advantage of the Charitable IRA Rollover



Experts estimate heirs may receive less than half of IRA assets that pass through estates. The Charitable IRA allows people aged 70 1/2 and older to transfer up to \$100,000 from Individual Retirement Accounts to charity — without incurring income taxes today, or estate tax in the future.

The Charitable IRA provision allows you to transfer your IRA assets directly to the CFMC. Because we are a public charity, the money is not included in your gross income, and so it is not taxed, preserving the full amount for philanthropic purposes. You can create a field of interest, unrestricted or designated fund for the charitable purpose of your choice.* For anyone interested in establishing a permanent legacy for good, this is the opportunity to make the gift of a lifetime!

Gifts made to donor advised funds are not eligible.