

Creating Your Legacy

Many generous individuals and families choose the Community Foundation for Monterey County (CFMC) as their partner in philanthropy. Providing philanthropic resources through their estates allows the CFMC to truly be “here for good” – here forever, for the good of the community. It’s a testament to these visionary donors that last year the CFMC reached a

“It’s only right to give back if you can. It means you’re leaving something behind that reflects you.”

—TOM AND KATHY MACDONALD

milestone of more than \$100 million granted to local nonprofits working towards healthy, safe, vibrant communities. The CFMC stewards these donors’ philanthropic legacy as well as more than \$160 million in total assets. Those who have informed us that the CFMC is in their estate plans are eligible for membership in the CFMC’s Legacy Society.



(l to r) CFMC board member Ken Petersen, Mel Burnett and Don and Carol Hilburn enjoy the Legacy Society luncheon

Richard Green



Legacy Society members Tom and Kathy Macdonald

Legacy Society Profile — Tom and Kathy Macdonald

Each Legacy Society member has a story, and such is the case with Tom and Kathy Macdonald. Originally from Rhode Island and married over 50 years, the Macdonalds spent most of their lives in Hawaii. Tom describes their lives as very lucky. Tom and Kathy, both college English professors at the time, moved to Hawaii from Rochester, New York as a result of entering a travel contest on a jar of Miracle Whip. During their (winter) trip there, they interviewed for jobs and subsequently relocated. Kathy continued teaching, while Tom ultimately became President and CEO of the Hawaiian Trust Company.

Tom served on the board and investment committee of the Hawaii Community Foundation for more than ten years. After retirement, they eventually relocated to Monterey County. The Macdonalds included the CFMC in their estate plans because, “We know community foundations are reliable. They’re going to be here after you’ve gone and will respect your wishes and see that they’re properly implemented. (Working with the CFMC) gives you an opportunity to designate several recipients at once. And, suppose an agency goes out of business? The foundation has the ability to redeploy those resources to benefit that same type of work.”

Their estate plans currently include giving to CASA in both Santa Cruz and Monterey counties (now Voices for Children in Monterey County.) They will also establish scholarships for children who, like themselves, would be the first in

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Legacy Society Members Celebrated

Thanks to our many Legacy Society members who have chosen to partner with the CFMC by including the foundation in their estate plans or creating an endowed fund. More than 80 people gathered to hear an update from President/CEO, Dan Baldwin, at the Legacy of Giving luncheon February 19th at the Monterey Plaza Hotel.

Guests also heard from Sid Morris, Esq. on the personal satisfaction and tax benefits of including the CFMC in one's estate plans. Kellie Morgantini, Executive Director of Legal Services for Seniors, shared compelling stories of the impact of CFMC grants. For more information, please contact Christine Dawson at 831.375.9712 x126.



Above (l to r) Cathy Schlumbrecht, and CFMC board members Greg Chilton, Gail Delorey and Kelly McMillin

At right, Jeannie Tanimura



Sid Morris, Esq. spoke about the benefits to his clients of using the CFMC and his own decision to become a Legacy Society member

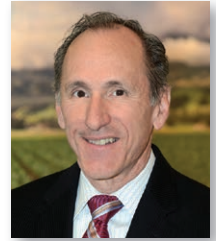
Photos above by Richard Green

PRESIDENT'S MESSAGE

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

I've been reciting our mission statement in a variety of settings recently. The King City Rotary Club. Meetings with nonprofit leaders. People interested in partnering with the CFMC for their philanthropy.

It has three fundamental components. The first is to **inspire philanthropy**. Inspiring philanthropy means showing philanthropy's impact on the quality of life in



Dan Baldwin,
CFMC President/CEO

Kelli Udall

The real outcome is how those grants to agencies improve the lives of the people they serve. —DAN BALDWIN, CFMC PRESIDENT/CEO

Monterey County, and that impact will attract further resources. At the CFMC this impact is predominantly derived through grantmaking to nonprofits, and the stewardship involved in making good decisions. We also show it through an investment process that assures resources are available in perpetuity. But the real outcome is how those grants to agencies improve the lives of the people they serve. This can be in human service, education, the arts, or environment. Inspiring philanthropy can mean having a donor advisor utilize their fund in ways they've never thought of, or having one of our grants be the inspiration for other gifts.

Catalyst for strengthening communities. Not as easy as it sounds. Grant dollars are limited, so we must involve ourselves in a variety of ways. Our Center for Nonprofit Excellence helps nonprofits be stronger and more efficient, and, through the LEAD program, is training the next generation of nonprofit leaders, readying them to step into critical roles at their agencies. It also requires listening. We can't presume to know what communities need. It is critical that we work within the unique dynamics of each city and town.

Throughout Monterey County. The inclusion of this line in our mission statement is deliberate, and it has been our primary focus in 2013. The CFMC is here for Big Sur, King City, Castroville, Salinas and Monterey, San Ardo, and all points in between. However, saying it is one thing; delivering something else entirely. Part of the challenge is the sheer size of our county. The first time I drove from my house in Monterey, down 101 and entered San Luis Obispo, I checked my watch. An hour and forty. Greenfield, often referred to as being in way South County, is actually the geographic center of Monterey County. The diverse nature of each of our communities creates a richness that is remarkable, but it also means the CFMC must work hard to understand the dynamics/character/nuances of each one. I'm beginning to think no two acres of Monterey County are alike.

Meetings with leaders in Greenfield, King City, Soledad and Gonzales reinforce the passion that runs deep in each one of these cities. We are listening. We are learning. We fully expect deeper and more impactful relationships with these communities.

So what is the goal? Let's see....*inspire philanthropy....be a catalyst for strengthening community....throughout Monterey County.*

Girls' Health in Girls' Hands Update

Girls' Health in Girls' Hands (GHGH), an initiative of the CFMC's Women's Fund, is celebrating the end of a busy first year. Six collaborating agencies have come together to enhance girls' access to health information, develop leadership skills and amplify the voices of girls through girl-led advocacy projects.

GHGH recently held its second health summit on April 20th at the Rancho Cielo Youth Campus in Salinas. This summit was planned by girls from the partner agencies to provide hands-on experiences and training in various topics related to health. More than seventy girls from all over Monterey County came together and learned about healthy relationships, positive body image, physical exercise, healthy



Girls participate in YWCA exercise about personal space

“These agencies and girls are collaborating to become more powerful together than they are apart.” — LYNN MCDONALD, CFMC PROGRAM OFFICER

cooking, emotional well-being, reproductive health and more. These peer-led workshops and activities were chosen and implemented by girls for girls.



GHGH alumna Roxanna Sanchez (left) will work with girl leaders this summer as a CFMC intern.

Next up for GHGH will be to engage in an action project over the summer. Roxanna Sanchez, who participated in GHGH's 2009 research project as a high school student in Greenfield, will be spending her summer working as an intern with GHGH to mobilize girl leaders in a service learning project. As a direct result of her work with GHGH during high school, Roxanna is now studying Health Science and Child Development at San Jose State University.

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“Anyone who's been fortunate enough in their life to accumulate enough assets to make provision for the causes that are important to them should be thinking about the Community Foundation. It's only right to give back if you can. Besides the giving aspect; it means you're leaving something behind that reflects you.” —TOM MACDONALD

their families to attend college. And, support will be given to lower income families who have basic medical and dental needs.

The Macdonalds also give their time. Tom was active with several community organizations in Hawaii and currently serves on the board of Legal Services for Seniors. They received the 2001 “Volunteers of the Year” award in Santa Cruz County for Kathy's work at CASA and Tom's with Above the Line, a home for homeless teens. Kathy works with the Carmel Valley Women's Club scholarship award committee.

About the Legacy Society

The Legacy Society was created to recognize and honor those who thoughtfully plan gifts through bequests, trusts, life insurance, charitable gift annuities, and other special estate gifts. Members of the Legacy Society understand the need to ensure philanthropic resources for generations to come. Members are recognized in our annual report and invited to an appreciation luncheon each year to hear first-hand from President/CEO, Dan Baldwin about the impact that Legacy Society members have created.

Legacy gifts reflect your personal values and belief in the missions or organizations benefitting the communities we serve. We invite you to make a lasting difference by providing for the future of the CFMC in your financial or estate planning. Your gift, in addition to providing for important community needs, may also offer you income and tax benefits. Please consult your professional advisor for details.

New Members*

Rick and Tonya Antle
Jay and Ann Brown
Julie Conrad
Joel and Dena Gambord
Dominic Gregorio
Carol and Don Hilburn
Jeffrey and Amanda Holder
Craig and Christine Johnson
Jan McAlister

Bruce Dunlap receives his Legacy Society pin from Julie Conrad



If you are interested in joining the Legacy Society, have already included the CFMC in your estate plans, or if you would like more information, please contact Dan Baldwin or Christine Dawson at 831.375.9712.

*New members (since Fall 2012)

PETER AND JACKIE HENNING

The Henning Family Fund

One of the ways the CFMC seeks to inspire philanthropy is through sharing stories. The Hennings are a couple new to the area who are using their donor advised fund to engage in the community and make a difference.

Peter Henning, born and raised in Aurora, Illinois met Jackie Eagen, a southern California native, while he attended Amherst and she attended Smith College in Massachusetts. They married and moved to Michigan, where he earned a PhD in Economics, and she earned Masters degrees in Education and Social Work at the University of Michigan.

In 2000 their daughter came to work in California and they began to spend time in Carmel Valley. Peter was the third generation owner of the Plano Molding Company. He sold the business in 2007, and stayed on as Chairman through 2010. His retirement prompted their full time move to Monterey County in 2011. They immediately began giving back to the community, volunteering for local nonprofits and opening a donor advised fund at the CFMC.

They both share a love of music. Peter serves on the board of the Monterey County Symphony and Jackie is a board member for both Youth Orchestra Salinas (YOSAL) and Camerata Singers and is a docent for the Pt. Lobos Foundation. Peter has played the trombone with YOSAL kids and is a member of the Camerata singers. And, they are volunteers for Meals on Wheels, delivering food to seniors in Carmel Valley.



Amanda Holder

Jackie and Peter Henning enjoy giving back through their donor advised fund

“Community Foundations are strong and long-lived. They have an intimate knowledge of the effectiveness of local nonprofits that is really valuable” —PETER HENNING

They were familiar with community foundations due to Peter's involvement as a board member at the Community Foundation of the Fox River Valley (Illinois). They have used their fund to grant to more than a dozen local groups including the Symphony, YOSAL and the Boys and Girls Club. “It's fun to get involved and give now instead of waiting until you're gone,” observes Jackie. “With the Community Foundation you also have a sense that your legacy will be honored according to your wishes,” she added.

“I like your motto, ‘Here for Good.’ Community Foundations are strong and long-lived. They have an intimate knowledge of the effectiveness of local nonprofits that is really valuable,” said Peter.

NEW FUNDS ESTABLISHED*

DONOR ADVISED

Monica Abbott Scholarship Fund

Chris's Fund

Mary and Peter Hobley Memorial Fund

Richard Scott Reynolds Science
and Technology Education

Scholarship Fund

The Fred Rowden Memorial Fund

AGENCY FUNDS

Sun Street Centers

Stewardship Fund

Temple Beth El

Stewardship Fund

FIELD OF INTEREST

Rodney & Betty Guilfoil Fund

Hausdorf Family Scholarship Fund

The Fund for Homeless Women

Non-Endowed Fund

Monterey Experience Project

Evelyn and Spencer Thompson Fund
to Help Feed the Hungry

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 January 2013*

Nonprofits Benefit from Combining CNE Resources

The Center for Nonprofit Excellence (CNE) works with agencies to build their organizational strength, leadership and sustainability. The CNE recognizes that each organization has unique challenges, so it offers services and opportunities they can combine in ways that are most effective for them.

Staff from **Loaves, Fishes and Computers** have been regular attendees at CNE workshops, and now their Executive Director has joined the Executive Directors' Learning Community for more in-depth support.

Friends of Parents Place first received an Organizational Development grant to develop a sustainability plan, then participated in the Strategic Partnership Project to work with long-term partners towards a joint plan of action. They are now participants in our Individual Donor Development Institute, a key element of that plan.

Organizations calling in for a quick consultation may end up connecting with a consultant from our database, finding a good online resource on our website, or learning about a local nonprofit whose experience can serve as a guide. **Legal Services for Seniors** has successfully combined several CNE services, as noted in a recent email:

"Your support and willingness to work with us, workshops on planned giving, social media and individual donors, online resources, personal conversations and meetings, Organizational Development grants for materials and donor stewardship software, are all combining to help us make our goal of long-term organizational sustainability an obtainable reality." — Phillip Geiger, Legal Services for Seniors

We invite local nonprofits to take advantage of the wealth of tools offered through the CNE to help them connect, lead and thrive. To sign up for the monthly nonprofit enews, learn about workshops, funding opportunities and other resources, visit www.cfmco.org/cne.

ACT Team Honored for Supporting Nonprofits with Pro Bono Consulting



ACT team members (l to r): David Tatumoto, Ron Wormser, Kaki Rusmore, Director Center for Nonprofit Excellence, Brooks McChesney, Catherine Hambley, Barbara Bishop, Denny Paul (Not Pictured): Jim Graber, Sandy Hale, Larry Hart, Alex Lilley, Ian Priestnell

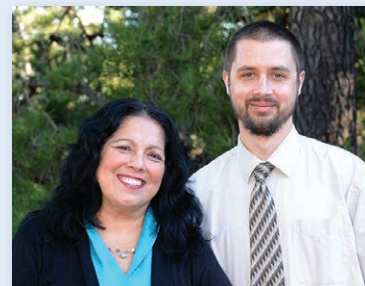


Participants with instructor Lisa Bennett at Individual Donor Development workshop

Amanda Holder

New Staff Join CFMC

The CFMC recently welcomed Christopher Platt, CPA, Accounting Manager and Nelda Getz, Administrative Coordinator, to the foundation team.



Nelda Getz and Christopher Platt

Nelda Getz

As Administrative Coordinator, Nelda is the friendly first impression of the Community Foundation when you call or visit our Monterey office. Her positive attitude and willingness to provide information is critical to the CFMC. She answers incoming calls, greets and directs visitors and assists all departments with special administrative projects, including support services to the President/CEO. Prior to joining CFMC Nelda worked for Bookette Software Company as the Executive Assistant to the CEO. Nelda has lived most of her life on the Monterey Peninsula.

Christopher C. Platt, CPA

As Accounting Manager, Christopher assists the Director of Finance and HR in overseeing the Community Foundation's Finance Department in the areas of accounting, grantmaking and database administration. Christopher joined the foundation in 2012. Prior to that, he worked in public accounting at BBR LLP (now PMB Helin Donovan). In addition to audit responsibilities, he worked in the areas of individual and business taxation, as well as general accounting. Christopher grew up in Pacific Grove, CA, where he now resides with his family.

Grant Information Sessions Register Now

Community Impact Request for Proposals Deadline: August 2, 2013

Grant Information Sessions will highlight new revisions to the Community Impact Grantmaking Framework, to be released in June. The CFMC will accept grant applications in the following program areas:

Strengthening Our Communities

- Community Engagement
- Economic Opportunity
- Healthy Places and Spaces



Celebrating Our Cultures

- Experiences
- Heritage



Stewarding Our Environment

- Environmental Engagement
- Animal Welfare



Nonprofit organizations considering submitting a grant application under the August deadline are encouraged to attend a session.

June 12 – Greenfield Library

June 13 – CFMC Salinas

June 26 – CFMC Monterey

REGISTER at www.cfmco.org/eventbrite.com. Please visit www.cfmco.org/communityimpact for more information



Community Impact (Building Blocks/Wellness) grant committee members attend orientation

GRANTMAKING

Here are just a few examples of grants where funding is making a meaningful difference for many people and communities throughout Monterey County. For a full list of grants made in 2012 in each impact area, please visit: www.cfmco.org/grantsandsupport.

Greenfield Science Workshop

Community Impact Grant \$10,000

The Greenfield Community Science Workshop (CSW) opened in fall 2011 to provide “a safe, fun and stimulating environment where youth can explore their world through science.” Students are introduced to science concepts and given the opportunity to develop their own projects designed to stimulate discovery-driven learning. The CFMC funded field trips and science enrichment workshops to elementary school classes in Greenfield serving approximately 700 students. Workshops provide hands-on science experiences for youth that cover topics such as sound by making musical instruments, the water cycle through making a terrarium, and motion by constructing simple machines. We also funded a long-term business and fundraising plan for this new program to support their ongoing sustainability.



Ashley Correia assembles left flipper along with Vista Verde Middle School students putting together the skeleton of a 30ft gray whale

Provided photo

Monterey County Symphony

Opportunity Grant \$5,000

The Monterey Symphony kicked off their “Season of the Piano” with an innovative outreach campaign to raise awareness and engage residents in art and music. For the first time in Monterey County, eleven Street Pianos, designed and decorated by local

artists and community groups, were located in public spaces across the Monterey Peninsula and Salinas for people to play and enjoy. The idea for this project came from Europe where British artist, Luke Jerram, has reached more than 2 million people since 2008. These public installations and interactions have been documented and promoted on social media and through www.streetpianos.com/monterey2013.



Visitors at MY Museum enjoy the “Play Me I’m Yours” piano

Ben Kaatz Photography

IMPACT

Visiting Nurse Association Community Services

Community Impact Grant \$35,000

Visiting Nurse Association (VNA) Community Services provides alternatives to health care given in hospitals or other institutional settings and assists in the prevention of chronic health conditions. Based on an existing workplace program, the VNA piloted a new wellness program at a CHISPA site in Salinas, a low-income housing development. Residents were invited to planning meetings and team leaders were elected. Registered nurses provided training to the coaches. Monthly meetings address one of three areas: diabetes prevention and management, weight management, and stress management. The program has been so popular, day and evening classes are scheduled to meet families' needs. It is expected that 75% of participants will complete health screenings and experience a positive health behavior change.



CHISPA Residents participate in exercise following Active Lifestyle presentation

“The interest, active involvement and impact this grant has had on lifestyle improvement of CHISPA residents has exceeded our expectations.”

—ANDREA ZOODSMA, RN, CENTRAL COAST VISITING NURSE ASSOCIATION & HOSPICE

El Pájaro Community Development Corporation

Community Impact Grant \$25,000

Entrepreneurship is a main force behind economic growth, job creation and industrial and technological innovation in rural areas. El Pájaro CDC offers low-cost and free bilingual business education training and consulting services including topics such as creating a business plan, marketing, customer service, bookkeeping, loan preparation and financial management. Its new commercial kitchen incubator supports small food-based businesses and farmers who want to sell their produce through business assistance and complying with strict food safety regulations. The majority of El Pájaro CDC's clients are [Latino] micro businesses, providing childcare, food preparation, landscaping and retail services. Its recent Business Education and Loan class at Hartnell College served residents from Salinas, Gonzales, Greenfield and Seaside. This grant supports outreach, financial literacy classes, business education and counseling to 200 people in Monterey County.



2013 graduates of the winter/spring Business Education and Loan Program

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Community Foundation
for Monterey County

RETURN SERVICE REQUESTED



Ben Kartz Photography

Monterey County Symphony
"Play Me I'm Yours" piano.
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GIRLS' HANDS

recycle bug
FPO



Richard Green

Members of the 2012/2013 LEAD Institute

"LEAD is geared to both transform the participants and benefit the organizations and communities they serve,"

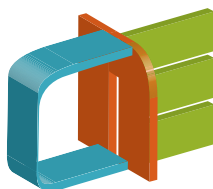
—KAKI RUSMORE, DIRECTOR CENTER FOR
NONPROFIT EXCELLENCE

COMING SOON! 2014 LEAD INSTITUTE

The LEAD Institute for emerging nonprofit leaders will soon be inviting applications for its 2014 class. Serving San Benito, Santa Cruz, and Monterey counties, LEAD is high quality in-depth professional development. The program includes monthly seminars, applied learning in the workplace, peer and leadership coaching and personal and professional goal setting. Applications will be online June 1st and due October 1st for the class beginning February, 2014.

"LEAD is geared to both transform the participants and benefit the organizations and communities they serve," says Kaki Rusmore, Director Center for Nonprofit Excellence.

The program has served 73 leaders from 62 organizations to date. For a list of past participants, pricing and scholarship information or more details, please visit www.cfmco.org/LEAD.



**center for
nonprofit excellence**

COMMUNITY FOUNDATION FOR MONTEREY COUNTY