



## The Power of Endowment



Robert and Virginia Stanton

One of the main goals of the first Community Foundation, established in Cleveland in 1914, was to establish permanent charitable assets to benefit the community. Now, nearly 100 years later, that “Here for Good” vision still holds true. The Community Foundation for Monterey County (CFMC) seeks to inspire philanthropy and build charitable endowments to strengthen local communities through grants to nonprofit organizations.

Although the needs of our communities in Monterey County will change, the importance of addressing those needs will remain constant. An endowed fund is a permanent resource that can adapt to changing circumstances. A percentage of the fund’s value is available to grant each year while the principal remains intact and is invested to grow over time.

### The Robert and Virginia Stanton Endowment Fund—Grantmaking Exceeds Original Gift

An example of this visionary philanthropy is the Robert and Virginia Stanton Endowment Fund whose grantmaking and fund balance have exceeded the original gift.

Virginia Young Stanton moved to the Monterey Peninsula in 1924 as the party and entertainment editor of *House Beautiful*. She volunteered for the Monterey Museum of Art, the American Red Cross, and the Community Hospital Auxiliary. She was a member of the Monterey Council of the National Trust for Historic Preservation and one of the founders and a major donor for the Stanton Center and Maritime Museum, now home to the Museum of Monterey. Her husband, the noted architect Robert Stanton, designed the Monterey County Courthouse and King City High School auditorium. Both are listed on the National Register of Historic Places.

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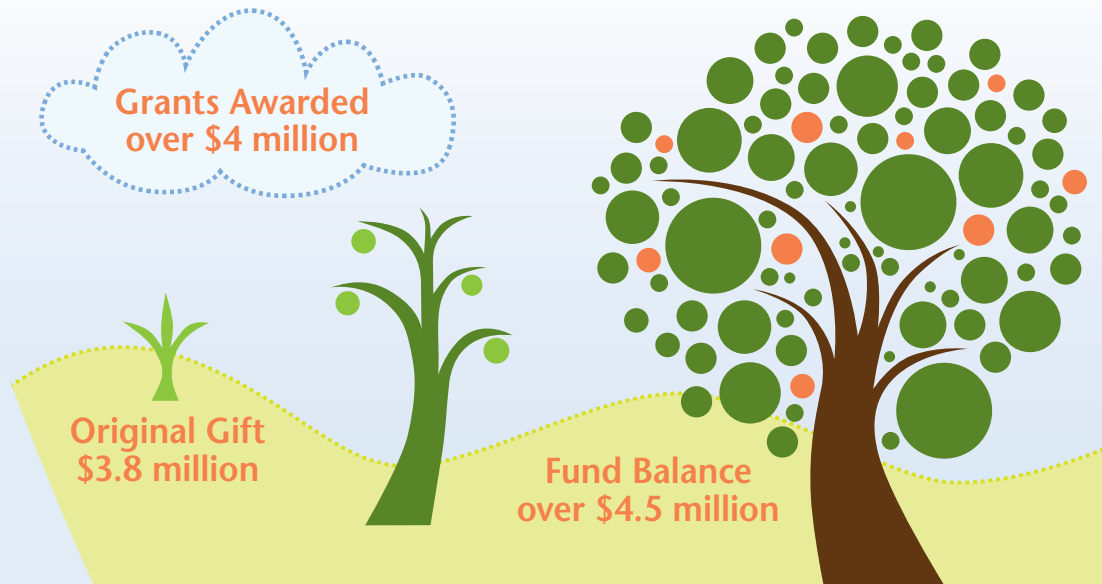
#### In this Issue

- 1 Power of Endowment
- 2 President’s Message
- 3 Community Leadership Project
- 4 Giving Local: The Brown Family Fund
- 5 Becoming Visible
- 6-7 Grantmaking Impact
- 8 Women’s Fund Breakfast

Grants Awarded  
over \$4 million

Original Gift  
\$3.8 million

Fund Balance  
over \$4.5 million



## Celebration of Philanthropy — \$100 Million Milestone

Giving back was center stage at the 2012 Celebration of Philanthropy on October 3rd at Corral de Tierra. Close to 200 supporters enjoyed an update from President/CEO, Dan Baldwin, who announced the CFMC had reached an impressive \$100 million grantmaking milestone. 2012 Board Chair Craig Johnson recognized the philanthropic leadership of Distinguished Trustee Award recipients David and Laurie Benjamin. Guests enjoyed wines courtesy of Scheid Vineyards and music by Patrick Hogan, of the Monterey County High School All-Star band of the Monterey Jazz Festival.



(l to r) Ryan Flagg, Alfred and Elvira Diaz-Infante, Paul Mondestin



(l to r) Christine Johnson, Jeanne Landreth



(l to r) Steve Packer, Martha Kennifer, Laurie and David Benjamin, Rick Kennifer

Photos above by Michael Troutman

## PRESIDENT'S MESSAGE

It's interesting how words and phrases enter our lexicon, then stay or disappear. Writing this column a year ago if I'd made reference to the fiscal cliff and its impact on your charitable giving, you'd have scratched your head, gazed out the window and thought, What? Yet, at the end of 2012, that's just about all we heard. An undercurrent to the fiscal cliff were several topics that affect philanthropy, among them the IRA rollover, the estate tax exemption, increases in long term capital gains and limits on charitable deductions.



Dan Baldwin,  
CFMC President/CEO

Keili Udall

**“ Nonprofits and their donors have become such a powerful force that folks believe instituting limits won't affect the size and impact of giving. —DAN BALDWIN, CFMC PRESIDENT/CEO**

I started my career in nonprofits in the 1980s. For the first 20 or so years, one hardly heard a thing about charitable giving within the context of national budget discussions. In fact, up until six years ago, the last significant legislation relating to charitable giving and the nonprofit sector was the Tax Reform Act of 1969. Nonprofits and charitable giving were able to grow and develop, and provide great benefit to society, without landing in the middle of a national debate.

Then, in 2005, along came Iowa Senator Charles Grassley, who chaired the Senate Finance Committee. Senator Grassley would recount seeing billboards asking folks to donate their cars (no matter their condition) to charity in return for a healthy tax deduction. This spurred him to look more deeply into the world of philanthropy, and he was alarmed by what he found. However, it was a few bad players casting a long shadow on the millions of donors and nonprofits who strictly abided by the rules.

Considerable wrangling followed, and there were great fears of heavy-handed regulation that would erode the effectiveness of the sector and its philanthropic partners. The Pension Protection Act of 2006 was the result. It did indeed call for stricter regulations for scholarship funds and required all nonprofits to make some type of IRS filing, no matter their size.

But the Pension Protection Act also created the IRA rollover, giving folks 70½ or older the ability to make charitable contributions up to \$100,000 from their required minimum distribution and not have to show it as income. It is hard to know how much giving this has created since 2006, but it is certainly in the hundreds of millions of dollars. The fiscal cliff bill that was passed on January 1 renewed the IRA rollover.

My point? The only reason the charitable deduction, etc. found its way into the debate, is because charitable giving in this country has grown to the point that the government looks to the deduction as significant lost revenue. We should actually take this as a compliment. Nonprofits and their donors have become such a powerful force that folks believe instituting limits won't affect the size and impact of giving. And while we all know the math doesn't work on the federal budget, it feels dangerous to put limits on something that creates so much benefit.

My other point? Despite the angst over Senator Grassley's probing, he pushed hard to create the IRA rollover. Having the long-cherished charitable deduction in the spotlight is scary. But it's also

continued on page 3

# Community Leadership Project

## Strengthening Organizations Serving Low-Income and Diverse Communities

The CFMC's support of the Community Leadership Project (CLP) is guided by our belief that effective community organizations and leadership in the nonprofit sector are crucial to a vibrant, prosperous Monterey County. The CLP began in 2009 as a special three-year initiative of three private foundations.\* The CFMC was chosen to provide grants, technical assistance and leadership programs to local organizations. Our goal is to help community-based organizations grow, flourish and, ultimately, be equipped to positively affect the lives of low-income residents in Monterey County.



CLP grantees share their accomplishments

**“The CLP grant was the single most influential factor in igniting our continued transformation to a more effective and sustainable organization. It gave the board and staff fresh insight and passion and the tools to build a solid future.”** — JENNIFER WILLIAMS, PRESIDENT, CCCIL BOARD OF DIRECTORS

Nine small nonprofit organizations received CLP grants of \$40,000 each and carefully targeted capacity building support. These CLP grantees—**Alisal Center for Fine Arts, Central Coast Center for Independent Living, 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**—have learned a great deal over the past three years about nonprofit management and governance. All have made improvements in the way they operate.

In 2013, we begin a new phase of the CLP with the goal of increasing the sustainability of another set of small, community-based organizations. The CFMC is serving as the lead intermediary for the Central Coast CLP Collaborative, a partnership with Community Foundation Santa Cruz County, Community Foundation for San Benito County, and Community Foundation for Monterey County. We will work together over the next three years to provide grants and mentor support to thirteen Central Coast organizations as they develop more resilient leadership, adapt to change, and become financially stable. Applications for this new phase will be by invitation only. For more information, contact Julie Drezner at 831.375.9712 or julied@cfmco.org.

*\*The David and Lucile Packard, James Irvine and Hewlett foundations created the CLP in 2009 with the goal to build the capacities of small and midsize organizations serving low-income and communities of color in three regions of California: the San Francisco Bay Area, San Joaquin Valley, and the Central Coast. The funders recently announced the second phase of the CLP to begin in 2013 and extend through 2015.*

### PRESIDENT'S MESSAGE continued from page 2

a moment, an opportunity, to seek solutions that can potentially bring greater benefit to our community in the future. Rather than putting up defenses and say go solve the big problem elsewhere, perhaps the sector needs to be in the conversation, be part of the solution. Provide data. Educate. Collaborate. Cliffs are cliffs. If we go over, no one benefits.

## Monterey County Gave Big!

The 2012 Monterey County Gives! campaign raised \$750,669. Each year's total has marked a new record since the 2009 start of the Gives! campaign, which evolved from the Weekly Community Fund established at the CFMC in 2000.



The total includes a \$100,000 match from the Monterey County Weekly Community Fund – made possible by key support from the David and Lucile Packard Foundation and Neumeier Poma Investment Counsel, partnering with the CFMC and the Weekly.

The agencies receiving the most donations are: the International School of Monterey with \$53,721, the Media Center for Art, Education and Technology Foundation, with \$50,931; and the Henry Miller Memorial Library, with \$44,615. The CFMC granted \$1,000 to the Henry Miller Library for having the most donors under 35 and another \$1,000 for the most donors overall. Friends of the Monterey Public Library will receive \$2,500 for their “Big Idea” of restoring Sunday hours.

**“The Gives! campaign has become an important vehicle for people to learn about the work of nonprofits, and then be inspired to support them.”**

—DAN BALDWIN



# FUND HOLDER PROFILE—GIVE LOCAL

## The Brown Family Fund

Ann and Jay Brown recently opened the Brown Family Fund at the CFMC. We asked Ann, who is the 2013 CFMC Board Chair, why she and her husband made the decision to partner with the CFMC.

Ann noted that “learning that the money you give to the CFMC stays in the community was a big plus. In the past we gave primarily to national organizations. Being able to see how the CFMC works and how well your gift is protected and managed gave us a lot of confidence. It’s very comforting to know the CFMC will be here to take care of the people of Monterey County. You shop local, eat local, why not give local?”

After Jay sold his company they decided to set aside a percentage to go to philanthropy. They hadn’t concluded which organizations to support and appreciated the flexibility of a donor advised fund, where grants can be made over time. As a member of the CFMC Grants and Programs Committee, Ann saw that many worthwhile organizations couldn’t be funded due to limited philanthropic resources.

“I knew as a fund holder that Nick (Nick Gregorio, Philanthropic Services Officer), would be able to let us know of giving opportunities in line with our interests.”

Ann and Jay want to focus on organizations serving South County, youth, and women and girls through the Women’s Fund, a field of interest fund of the CFMC.



Michael Troutman

New donor advised fund holders Jay and Ann Brown

“ The CFMC will be here to take care of the people of Monterey County. You shop local, eat local, why not give local?”

—ANN BROWN

About deciding which organizations to support Ann says, “A grant shows someone else believes in what you can do. That will be the fun part!”

### Why choose the CFMC?

“I knew our money would be in good hands and would stay local. The CFMC is a great partner for anyone interested in philanthropy.”

*Note: Ann first took a grantwriting seminar at the CFMC, joined the board in 2009, chaired the Grants and Programs committee, and is now the 2013 CFMC Board Chair.*

## The Power of Endowment, *continued from page 1*

“ It will continue to grow — and grant — over time, demonstrating the power of charitable endowments.” —DAN BALDWIN

In 1985, after Robert’s passing, Mrs. Stanton established her first endowment at the CFMC for awards to outstanding local architects in his honor. Mrs. Stanton continued her legacy of giving by leaving a \$3.8 million bequest in 1994 to establish the Robert and Virginia Stanton Endowment Fund. She named specific agencies and types of projects for consideration for the annual grants. A Committee was established to advise the CFMC’s board, guided by her wishes and interests.

Since the original gift of \$3.8 million, over \$4 million has been granted through 2012. And, the fund has a current balance in excess of \$4.5 million dollars. “It will continue to grow — and grant — over time, demonstrating the power of charitable endowments,” said Dan Baldwin, CFMC President/CEO.

The donors of unrestricted funds trust that the CFMC is knowledgeable about the community, and can bring organizations together around important issues. Donors with varied philanthropic interests find that an unrestricted fund at the CFMC is a simple and flexible way to accomplish their charitable objectives.

The CFMC is grateful to those who have the vision to leave a legacy by creating endowed funds in their lifetimes or through estates. Their generosity will enable the CFMC to make a lasting impact for generations thanks to the enduring power of endowments.

“ I am invisible, understand, simply because people refuse to see me... When they approach me they see only my surrounding, themselves or figments of their imagination, indeed, everything and anything except me.”

—RALPH ELLISON'S INVISIBLE MAN: (FROM CARL CHERRY CENTER EXHIBITION CATALOG)

## “Becoming Visible” — The Fund for Homeless Women

Michael Reid, associate rector at St. Mary's by-the-Sea Episcopal Church was moved to action by a letter from a formerly homeless woman named Joyce. She described her life as a homeless person, spending the night outside in the elements without a sleeping bag or tent, being vulnerable and living in fear. “She wanted to do whatever she could to make sure women had a bed at night and that they didn't have to worry about what might happen to them while they slept.” He says. “Joyce's story broke my heart. And although I didn't know how I could help, I knew that I had to try.”

He found out that there were indeed gaps in the care of homeless women, particularly for women who were single, older and simply poor. He discussed it with his friend Kathy Whilden, a 30-year local social worker veteran and Buddhist priest, and Carl Cherry Center executive director Robert Reese who suggested they do an exhibit to raise awareness. The result was a striking multi-media art exhibit including photography, audio, video and stories exploring the lives of homeless women in Monterey County. “Becoming Visible: The Face of Homeless Women in Monterey County” ran November 9 through December 14th.

At the same time, Reverend Reid wanted to create resources to help agencies support homeless women and he approached the CFMC about creating a field of interest fund. “The Fund for Homeless Women” was born. An anonymous CFMC fund holder, moved by this reality faced by these invisible women, donated \$50,000, creating a permanent endowment for the new fund.

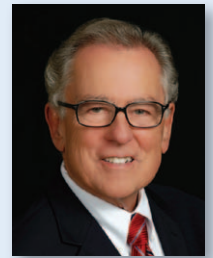


“Sun”

Ken Wondemman

## CFMC Welcomes New Board Members

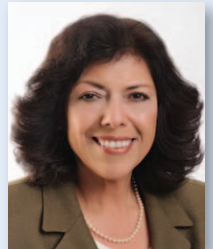
**Ken Petersen** is President of Monterey Private Wealth. He was a founding board member of the Big Sur International Marathon, Treasurer of the Naval Postgraduate School



Ken Petersen

Foundation and serves on the Planned Giving Advisory Councils of the Community Hospital and Hospice Foundations. He is past-president of the Pacific Grove Rotary Club and volunteer for the Monterey County Sheriff's Aero Squadron. He writes a Financial Planning column in the Monterey County Herald.

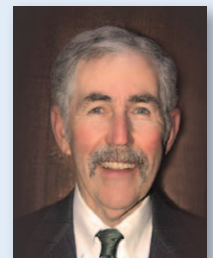
**Anna Marie Ponce**, an Aromas resident, is founder of Sun Valley Berries, LLC a family owned berry business in the Pajaro Valley with farming operations in the Santa Cruz and Monterey



Anna Marie Ponce

Counties. She is the office manager for the Borina Foundation in Watsonville, served on the YWCA Watsonville Board of Directors, and volunteered at the local Community Center to teach the Spanish speaking community to read and speak English.

**Ken Wright** spent 20 years working for the California Highway Patrol in Big Sur. He owned and operated the Glen Oaks Motel and other local



Kenneth Wright

businesses. He helped found both the Big Sur River Run, a 10K race benefitting local charities, and The Big Sur Fire Brigade. He has served on the boards of The Big Sur Foundation, the Big Sur Health Center, the Big Sur Land Trust, the Monterey County Travel and Tourism Alliance and the Monterey Jazz Festival.

## NEW FUNDS\*

### DONOR ADVISED

Brown Family Fund  
DeWitt Fund  
Dr. Adriana Hayward Fund  
Mahoney/Peterson Family Fund

### AGENCY FUNDS

Community Human Services Stewardship Fund  
Shelter Outreach Plus Stewardship Fund  
Museum Foundation of Pacific Grove Library 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.

### FIELD OF INTEREST

Fund for Homeless Women

\*established since October 2012



## Opportunity Grants

2012 saw the launch of Opportunity Grants, a small grants program which accepts applications throughout the year.

Opportunity grants allow the CFMC to make small (typically \$1,000 to \$5,000) grants for emerging projects or organizations, or unforeseen, unexpected projects that fall outside of our Community Impact grant schedule.

An example of a time-sensitive grant recipient is Community Action Board of Santa Cruz County, which received \$5,000 to pay for Deferred Action application fees for residents of Monterey County, in response to recent legislation.

Opportunity grants also encompass what was formerly known as technical assistance grants, one-time organizational development expenses that address internal capacity-building efforts, such as agency restructuring, needs assessments and specialized staff/board training.



*Pacific Grove Museum Volunteer Bruce Cowan discussing plants in the Museums Native Plant Garden*

An example of an Organizational Development grant recipient is the Pacific Grove Museum, which received \$5,000 towards a matching grant for re-imagining the Museum's permanent galleries and facility.

For more information, including Opportunity Grant guidelines and application visit [www.cfmco.org/grantsandsupport](http://www.cfmco.org/grantsandsupport).

Opportunity Grants are typically processed in eight weeks and grantseekers are encouraged to call CFMC staff at 831.375.9712 to discuss proposal ideas before submitting an application.

# GRANTMAKING

Monterey County is a vast region with many excellent nonprofit organizations that help to make our communities healthier, safer and more vibrant. In 2012, the CFMC awarded \$3,305,000 to support 113 projects addressing our Community Impact priority areas: Investing in Our People, Strengthening Our Community, Celebrating Our Cultures and Stewarding Our Environment. While we received three times more requests than the amount of funds available, the grants we were able to provide will make a meaningful difference for many people and communities throughout Monterey County. Here are just a few examples of these grants. For a full list, visit [www.cfmco.org/grantsandsupport](http://www.cfmco.org/grantsandsupport) and select "Community Impact."

### First Night Monterey Celebrating Our Cultures Grant \$15,000

First Night Monterey (FNM) strives to bring families together and unite our community in all its diversity through the visual and performing arts and to celebrate families and community through workshops and the New Year's Eve celebration. In 2013, FNM will use the SeaChanges theme to focus their outreach. SeaChanges will be a county-wide multicultural, multidisciplinary arts outreach project that brings youth and the community together to explore water, watersheds, oceans and the way that we recycle and discard materials into rivers, lakes and oceans.



*Photo by Kira Corser*

*The SeaChanges outreach will expand on this Plastic Vortex art installation and create new works while building environmental awareness*

### First Mayor's House Heritage Grant \$15,000

The mission of the First Mayor's House is to bring the past to life for the benefit of local school children and bring the future to life for the Salinas Railroad Museum, stimulating the development of



*Students learn about local history at the First Mayor's House in Salinas*

the new cultural/heritage and intermodal transportation center.

This Community Impact Grant provides the initial seed money needed for phase one of program development leading to integration of the First Mayor's House within the public school standards for 2nd-4th grade children in English and math instruction. This will allow elementary school teachers the ability to integrate local history into the standards based school curriculum.

# IMPACT

## O'Neill Sea Odyssey

**Environmental Engagement  
Grant \$20,000**

O'Neill Sea Odyssey provides ocean-based field trips and science curriculum to 4th-6th grade students. Classes of 30 students participate in a free, day-long trip which includes lessons in navigation, ecology and marine biology, and a sail in the Monterey Bay aboard a 65-foot catamaran. Back at school, each class chooses a community service project to apply its learning to local community needs. Past examples include a beach clean-up, implementation of a school-wide recycling program and renovating a school mural. A long-term impact study found that 75% of the students exhibited retention of knowledge taught in the program four years after participating.



*The hands-on learning experience on this living classroom lasts a lifetime*

“The support we received from the CFMC enables lower income youth to experience science in the world’s largest classroom and laboratory, the Monterey Bay. It’s a life-changer for these students.” —DAN HAIFLEY, EXECUTIVE DIRECTOR, O’NEILL SEA ODYSSEY

## The Community Alliance with Family Farmers (CAFF)

**Healthy Places and Spaces  
Grant \$15,000**

The Community Alliance with Family Farmers (CAFF) recently received a \$15,000 grant to build a “Farm to School Program” in collaboration with the Greenfield Union School District. This project lays the foundation for a long-term effort to increase student knowledge of and access to fresh, healthy, locally-grown fruits and vegetables.

CAFF builds upon shared values around food and agriculture to create strong partnerships between family farmers and their neighborhoods. These collaborations create local economic vitality, improved human and environmental health, and long-term sustainability of family farms. CAFF’s Farm to School program works primarily in school districts with families living at or below the federal poverty level in an effort to transform them from passive consumers to informed eaters.

CAFF’s Harvest of the Month Tasting Kit program delivers locally grown produce and a curriculum to teachers to help them educate students about healthy eating, nutrition, and local agriculture. Last year, over 92 classrooms on the Central Coast served with 52 classrooms from Monterey County, reaching over 3,000 children and their families.



*Second grade students in Ms. Laurens’ class at Lincoln Elementary in Salinas are excited about sampling the local produce in CAFF’s Harvest of the Month Tasting Kit program*

## FOUNDATION OFFICES

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## INSIDE

- The Power of Endowment
- Grantmaking Impact
- Becoming Visible

SEE PAGE 5



Ken Wanderman

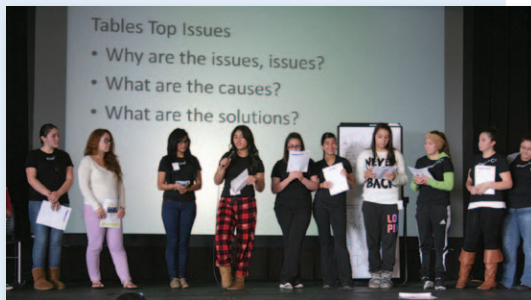
"Sun" (detail)

## Voices of Change Summit

Over 100 girls gathered at CSUMB on November 17 to pass the torch from the original Girls' Health in Girls' Hands participants, many of whom are now in college, to a new generation of girl-leaders.

A six-agency collaborative was formed in 2012 to work together over the next three years to actualize the girls' vision from the 2009 Women's Fund project. **Boys & Girls Clubs of Monterey County, Girls Inc. of the Central Coast, Monterey County Health Department, Monterey County Rape Crisis Center, Planned Parenthood Mar Monte and the YWCA Monterey County** received grants to work together and collaborate for greater impact.

The goal is for hundreds of girls from throughout Monterey County to have better access to health information and develop powerful leadership skills and help to create positive changes in their communities. For more information, visit [www.cfmco.org/ghgh](http://www.cfmco.org/ghgh).



Girl leaders at Girls' Health in Girls' Hands Summit inspire

## SAVE THE DATE!

## WOMEN'S FUND BREAKFAST

MAY 23, 2013

Over \$315,000 has been granted to date from the Women's Fund of Monterey County, a field of interest fund of the CFMC. The Women's Fund continues to grow towards the goal of \$1.5 million, in order to grant \$75,000 each year.

Supporters of women and girls in Monterey County are invited to attend the breakfast to hear directly from participants in the Girls' Health in Girls' Hands project and contribute to this important work and future grants as needs change over time. To receive an invitation, please contact Director of Resource Development, Christine Dawson, at 831.375.9712 x126 or [christine@cfmco.org](mailto:christine@cfmco.org).

women's fund

a field of interest fund of  
the community foundation  
for monterey county

[www.cfmco.org/womensfund](http://www.cfmco.org/womensfund)