

Top 5 Reasons to Partner with the CFMC

As we celebrate the centennial of the first community foundation, it's powerful to consider the impact of these charitable institutions in their respective communities. The CFMC ranks in the top 10% of foundations nationally. This is a testament to the generosity of a county with a relatively small population. Since 1984, the CFMC has granted more than \$111 million, holds 350 charitable funds and stewards over \$180 million in charitable assets. Our donors tell us there are many intangibles that have made us their philanthropic partner, including:

#1 Community Knowledge — and Beyond

Our professional staff have deep community knowledge. We can research specific areas of interest and our fund holders receive information on grant opportunities for their consideration. (See page 5) CFMC fund holders can also make grants to any 501(c)3 worldwide. *"We've worked with the CFMC for 20 years and have always enjoyed their support. They have helped channel our giving. It's been very satisfying for us."* – Howard and Karin Evans

#2 Flexible The CFMC works with each donor to maximize the potential of their giving. For example, many donors have recently converted endowed donor advised funds to non-endowed, to utilize their fund as their primary vehicle for philanthropy now, while including it in their estate plan later.

#3 A Trusted Steward Both the CFMC staff and board carefully steward the charitable assets entrusted to us, as well as the intent of each donor. The Investment Committee, advised by Wurts & Associates, guided the portfolio to a 13% return in 2013. Each donor's wishes are carried out in perpetuity. (See page 3)

#4 Maximum Tax Advantage As a public charity, the CFMC offers donors maximum state and federal tax advantages allowed by law in the year the gift is made. Charitable Gift Annuities and Charitable Remainder Trusts are two options that give income to the donor in their lifetime, while benefiting a nonprofit of the donor's choice through their estate. *"The CGA is a win-win situation where both the income beneficiary and the charity benefit."* – Marion and Paul Buccafurni

#5 Personalized Service A unique advantage is the individual attention each fund holder receives. The CFMC offers a variety of fund types to help donors make a difference. New Philanthropic Services include customized Private Foundation Services from grantmaking assistance to administration. *"We trust our gifts will be allocated effectively and put to beneficial use by each recipient."* – Joe and Sheila Mark

These are just some of the reasons that donors appreciate the CFMC's approach to enhancing their philanthropy. Please call 831.375.9712 or visit www.cfmco.org /10reasons to learn more.



(l to r) Kaki Rusmore and Christine Dawson meet with Susan Rosen, Sandy Leader and Susie Franklin to assist them with the philanthropic vision for the Franklin Legacy Fund as part of the CFMC's Private Foundation Services

In this Issue



YMCA camp
in Pajaro
(See page 5)

- 1 Top 5 Reasons to Partner with the CFMC
- 2 President's Message
- 3 Fund Holder Profile/New Funds
- 4-5 Grantmaking Impact
- 6 Women's Fund Update / Girl Leaders Take Action
- 7 Strengthening Nonprofits
- 8 Year-end Giving

Neighborhood Grant Recipients Inspire



Movimiento Cultural de la Union Indigena (Greenfield) teaches cultural preservation and traditional dance

The Neighborhood Grants Program (NGP) Awards Ceremony is one of the most inspiring CFMC events of the year. Grants support local residents who come together to improve their communities for themselves and their neighbors. From neighborhood watch to youth sports, arts and dance groups to parents of children with special needs, each grantee is passionate about their activities.

Twenty grassroots groups were selected to receive grants ranging from \$1,500 to \$4,000 along with additional leadership and project management training to organize ongoing activities in their respective communities. A total of \$60,200 was awarded. The 17th Annual Awards Ceremony on July 26 recognized



Tonatiuh-Danzantes del Quinto Sol of Salinas shares their passion for dance

these volunteers who have shown exemplary action to improve the safety, well-being, and quality of life in their neighborhoods. Since the program's inception in 1997, more than \$810,000 has been awarded.

"The CFMC is committed to supporting resident-led groups who are invested in giving back. We're able to make grants to local projects that might find it difficult to receive traditional grant funding,"

— AURELIO SALAZAR JR., CFMC PROGRAM OFFICER

For a full list of grantees visit www.cfmco.org/ngp.

PRESIDENT'S MESSAGE

Individuals + Small Gifts = Big Impact

In the world of philanthropy we are susceptible to celebrating the Big Numbers. Total assets. The huge bequest. Ginormous grants. We often forget that the greatest impact comes from small gifts, and that a donor's trust can produce remarkable rewards.



Valley of the Artists (Valle De Artistas) accept check at NGP awards ceremony

We recently held the annual check presentation ceremony for the Neighborhood Grants Program (NGP). NGP has been in existence for 17 years. By foundation standards, the numbers are modest. In 2014 we granted \$62,000 to 20 grassroots groups. Note that I didn't say "organizations," as many of these recipients are a collection of folks who are rallied around a particular cause or activity that makes their community or neighborhood stronger.

"Individuals, whether giving large or small, can make a profound impact."

— DAN BALDWIN, PRESIDENT/CEO

The grants ranged from \$1,500 to \$4,000. NGP is overseen by program officer Aurelio Salazar, Jr. who works diligently with each of the recipients, sometimes to do something as basic as set up a bank account. A volunteer grant committee spends two Saturdays hearing presentations by the applicants. NGP is very labor intensive, and if we focused only on the size of the awards, we'd wonder why we do it.

But a peek at the recipients will quickly reveal the value of this program. Some of the grantees are: Chuparrosa leadership development for parents with special needs children in Greenfield and King City; Comité de Acosta Plaza (Salinas) for community and resident development; Transition Aromas for environmental education and community events; Monterey Peninsula NAACP Youth Council (Seaside) for youth development and annual conference; Ciclovía (Salinas) for a city-wide health event for residents.

NGP recipients are simply giving of themselves to make a better life for others. I'm not sure there is a more resonant example of philanthropy, and it is very consistent with the source of the grant money. NGP is funded through the CFMC's general endowment, which consists of estate gifts by individuals who trusted the CFMC to make solid decisions with their charitable assets. The beauty lies in that the donors have no personal connection to any of these groups but their generosity and trust in the CFMC has allowed their gifts to directly improve the lives of people throughout Monterey County.

Fall is when we partner with the *Monterey County Weekly* on MCGives! Its power comes from the cumulative generosity of thousands of donors supporting a wide range of nonprofits. Gives! has grown every year, and, in 2013, total contributions topped \$1 million for the first time. Because Gives! utilizes its own website and online giving, making year-end contributions has never been easier. NGP and Monterey County Gives! represent how individuals, whether giving large or small, can make a profound impact.

STEWARDSHIP OF A LEGACY

Anita Tarr Turk Fund for Breast Cancer Research

Anita Tarr Turk of Gilroy, CA was a vibrant businesswoman, travel enthusiast and avid equestrian who became ill with breast cancer in her 40s and battled it for more than three decades. She never let cancer rob her of her positive outlook and determination. Wishing to spare others the pain she suffered, she was motivated to provide support for “top level research” searching for the cause of, and cure for, breast cancer.



Anita Tarr Turk

“ I think Anita would be delighted with the careful consideration the CFMC has given to accomplish her wishes.”

—MARK JOHNSON, JOHNSON, FANTL & KENNIFER, LLP

Her professional advisor Mark Johnson of Johnson, Fantl & Kennifer, LLP, listened and suggested the Community Foundation as a potential partner for her philanthropy.

“Anita wanted to support whichever organizations were conducting the most effective research in finding the cure for breast cancer, and elected to rely on the staff and board at the Community Foundation to make that determination on her behalf from year-to-year following her death,” said Johnson. After she succumbed to the disease, The Anita Tarr Turk Fund for Cancer Research was created through a bequest to the CFMC.

CFMC staff researched options to best fulfill her legacy and recently made the first grant from the fund in the amount of \$110,000 to the California Breast Cancer

Research Program to enhance a large-scale research effort. Since the fund is endowed, it will continue to make a difference in perpetuity in her name. Though she did not live to see it, her contribution serves to memorialize her unshakable belief that a cure will one day be found.

“ The CFMC takes seriously its role as a trusted steward of each of our donor’s philanthropic vision.” — DAN BALDWIN, PRESIDENT/CEO

Editor’s Note: Mark Johnson is a former CFMC board member and his partner Rick Kennifer is a current board member.



Legacy Society Members Chris & Toulia Hubbard

“ As we planned our estate, we wanted to express our values and set an example for our children and other families by including a legacy gift to the Foundation.”

— CHRIS & TOULIA HUBBARD

NEW FUNDS ESTABLISHED*

AFFILIATE

Southern Monterey County Foundation

AGENCY/STEWARDSHIP

The 1984 Fund

Center for Photographic Art Fund

Friends of the Marina Library Stewardship Fund

Youth in Wilderness Fund

DONOR ADVISED

Community Healthcare Corporation Fund

Jean and Jim Duff Fund

RSH Fund

Mark R. Wendland Memorial Fund

FIELD OF INTEREST

Wendy (Millard) Benjamin Fund

The John and Mary Dawson Learning Fund

SCHOLARSHIP

Dr. Roger and Kate Bartels Memorial
Scholarship Fund

Dr. Gladys M. Olvis Scholarship Fund

LEGACY SOCIETY MEMBERS*

Mishka Chudilowsky and Henry Azama

Susie and Charly Franklin

Chris and Toulia Hubbard

Robin Venuti and Joseph Rock

Jacqueline Wendland

The CFMC manages more than 350 funds established by individuals, families and businesses. To learn more about creating a fund or becoming a Legacy Society Member, please contact Dan Baldwin or Christine Dawson at 831.375.9712.

*Since March 2014

Scholarships & Awards Empower Youth

Scholarship programs are an important part of CFMC's work to strengthen our communities. The CFMC manages 36 scholarships and awards that benefit students, teachers, and community members throughout Monterey County.

This year the CFMC has given 71 scholarships and awards totaling \$290,000 and ranging from \$500 to \$60,000. These scholarship programs are varied, supporting students attending two- and four-year colleges and universities in California and beyond.

Awards programs support participants in youth baseball camps, recognize excellence in teaching and journalism, and help women achieve financial stability.

This scholarship means a lot to me because it is helping me reach my goals. I am blessed to have the opportunity to keep on succeeding in my education. I am excited to attend SJSU to become an independent person."

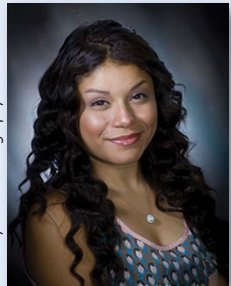


Photo by Cook's Photography

— MIRNA MUÑOZ, 2014 RECIPIENT OF THE \$60,000 MARGARET AND SEBA BRONSON SCHOLARSHIP

The CFMC works with donors to design a scholarship or award program that fulfills their vision. Philanthropic Services staff coordinates with high schools throughout the county to identify qualified candidates, select winning students, and pay scholarships directly to institutes of higher education.

For more information, contact Christine Dawson, Director of Philanthropic Services, at 831.375.9712 x126 or christine@cfmco.org.

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.

Big Sur International Marathon — Just Run

\$15,000 Community Impact Wellness grant

The Big Sur International Marathon is known around the world for its 26.2 mile race (and 10.6 mile, 9 mile, 5K and 3K events) along our beautiful coastline. In 2004, the Marathon created the Just Run program to help youth organizations and schools promote fitness and healthy lifestyle choices. The program includes running, aerobics, strength, flexibility/agility and nutrition education. Just Run operates in 12 states. In the 2012-13 school year, 10,000 students from 52 local schools throughout the Monterey County participated. A grant was made to support volunteer leaders training, program materials and expansion to 10 new schools in Bradley, Chualar, King City and San Lucas. Monterey County youth obesity rates are higher than the state average, and with many schools not offering a physical education program, Just Run hopes to offer youth exercise tips and promote lifelong habits of health and fitness.



The Just Run grant will support the expansion to 10 new schools

Interim, Inc.

\$35,000 Community Impact Wellness grant

Interim provides affordable housing, residential treatment, outreach, education and employment services for adults with serious mental illnesses. This summer, Interim opened its Pajaro Street Wellness Center in Salinas. This new site

consolidates and expands three of Interim's programs (education/employment, dual recovery and OMNI Resource Center) and offers mental health care provider trainings, as well as services in collaboration with Monterey County Behavioral Health. The Wellness Center also provides office space for the National Alliance for Mental Illness, which offers bilingual mental health education classes. The Community Impact grant supported renovations and furnishings which are expected to serve hundreds of people this year and many more in the years to come.



Interim, Inc. celebrates opening of Pajaro Street Wellness Center

IMPACT

Veterans Transition Center

\$100,000 donor advised grant

The Veterans Transition Center (VTC) helps Monterey County's homeless veterans and their families by providing transitional housing, emergency services and case management programs. The VTC gives veterans the tools they need to once again become employable and productive members of the community. An unrestricted grant of \$100,000 from the Dewitt Fund allowed VTC to put the funding to use where it was most needed: to create additional housing and support services at VTC's Fort Ord location. Now more veterans will have a place to live while they receive counseling and training so they can get back on their feet. Veterans can stay in the transitional housing for up to 24 months as long as they commit to being clean and sober, changing their lives and learning the skills needed to become self-sufficient.



Veterans Enjoy First Car Show at VTC

Central Coast YMCA

\$10,000 opportunity grant

Central Coast YMCA was recently awarded \$10,000 to support the expansion of their recreational programs and services in North Monterey County at the newly constructed Pajaro Neighborhood Park. The park, which opened on March 16, 2014, sits on four acres and includes a soccer and softball field; basketball courts; playground equipment, three pavilions with picnic tables, a walking track and restrooms. Youth and adult recreational programs are made possible by the Pajaro Sunny Mesa Community Services District, Together in Pajaro (TIP), and the Central Coast YMCA.



Girls enjoy camp in the new Pajaro Neighborhood Park

“We are grateful for this grant to help the Watsonville YMCA provide new programs at the new Pajaro Neighborhood Park.”

— BARB MCGAUGHEY, CEO CENTRAL COAST YMCA

Donors Co-invest

More than \$400,000 granted

Each Community Impact grant cycle the Philanthropic Services team sends a digest of the dozens of grant proposals the CFMC receives to our fund holders. We ask them to consider co-investing in our work of strengthening local nonprofits by recommending grants from their donor advised funds. As some



Students from Head Start at Raising a Reader end of year celebration

agencies' proposals receive co-investment funding, CFMC grant committees can allocate precious philanthropic resources further and deeper. More agencies are funded and the amount of individual grants can be increased, leveraging the impact of CFMC grants.

Donors appreciate the opportunity to co-invest with the CFMC to strengthen our communities.

“ (This) is a great way to apprise fund holders of important local needs. Most fund holders are not aware of many of these hard working worthy nonprofit organizations, so this grantmaking format enables them to receive financial support that they might not receive otherwise.”

—BILL & NANCY DOOLITTLE

Thanks to the generosity of our fund holders who have responded so far this year, 42 co-investment grants have been made totaling \$404,000.

Grant Information Sessions for February 6, 2015 Deadline

“Investing in Our People” Community Impact Grants

Learn about the updates and changes to the Community Impact grant program for 2015, including our new Online Application Platform. “Investing in our People” includes youth development and education and health and human services.

Advance registration is required at

www.cfmco.eventbrite.com

Questions?

Call 831.375.9712.

12/2/14	11:00 AM - 12:30 PM	King City
12/3/14	9:00 AM - 10:30 AM	Salinas
12/9/14	11:00 AM - 12:30 PM	Castroville
12/10/14	10:30 AM - 12:00 PM	Salinas
1/13/15	10:30 AM - 12:00 PM	Monterey

women's fund
of the community foundation
for monterey county

Changing Lives of Women & Girls

JOIN US for BUBBLES & BAGS

*Silent Auction of New, Gently Loved & Vintage Bags to
Benefit the Girls' Health in Girls' Hands Initiative
of the Women's Fund*

SATURDAY, NOVEMBER 15, 2014

Beach & Tennis Club, Pebble Beach

First Peek Preview • 11:00 AM – 12:00 PM
Tickets – \$100 (for "Buy it Now" purchases only)

Silent Auction • 12:00 PM – 3:00 PM
Free Admission with Sparkling Wine

Questions? Contact Jan McAlister at janm@cfmco.org
or 831.375.9712 x120

HOSTED BY



**PEBBLE BEACH
COMPANY**

SPONSORED BY



**ILLUSIONS of
GRANDEUR**

Natalie Baroni
Jewelry Designs

THE SCHAEFER PRESENT & STOFFERS
INVESTMENT GROUP



RBC Wealth Management

Comerica Bank



www.cfmco.org/womensfund

Women's Fund Tops \$1 Million

The audience of 400 at the sold-out Women's Fund Luncheon on May 9 was truly inspired by the energy of guest speaker, Nicole Vazquez, Board Chair of the



*Women's Fund supporters and GHGH participants
at annual luncheon*

Women's Foundation of California, as well as the energy of Girls' Health in Girls' Hands participants who attended. The program, "Why Stop Here? Fueling the

Potential of Women & Girls," motivated the crowd to donate more than \$115,000. Endowment Chair Tonya Antle announced that \$1,000,000 had been raised towards the \$1.5 million goal. Summing it up she said it all, "We're changing lives."

To be a part of the movement, visit www.cfmco.org/womensfund.



Girl Leaders Take Action

In April 2014, the Girls' Leadership Network (GLN) led "Post-A-Smile," a GHGH campaign to combat bullying and suicide by boosting self-esteem through posting of positive messages. The GLN organized over 75 girls from partner programs across the county and 11 school and community sites to work together to make the campaign a success. As GHGH's first cross-agency action project, it revealed the transformative power of collaborative girl-led work. The campaign received widespread media coverage and community support.



GHGH participants' Post-A-Smile campaign

**“It was good
to think I
helped to make
a difference”**

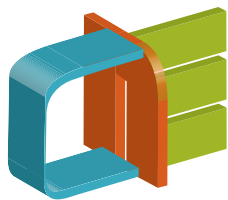
—SALINAS HIGH
GIRL LEADER

The new 2014-2015 Girls' Leadership Network has begun meeting. They are planning the annual GHGH Summit November 22 to be held at Chartwell School. The event will bring girls together from throughout Monterey County and inspire them to take informed action and create change.

Funding partners: The Peggy and Jack Baskin Foundation, The Claire Giannini Fund, Monterey Peninsula Foundation, The David and Lucile Packard Foundation, Nancy Buck Ransom Foundation, Women's Fund donors

GHGH
Girls' Health in Girls' Hands

CNE FALL WORKSHOPS



**center for
nonprofit
excellence**

COMMUNITY FOUNDATION
FOR MONTEREY COUNTY



Richard Green

CLP grantees convene

**Register at
www.cfmco.org/CNE**

CNE 2014 activities are supported
in part by a grant from the David
and Lucile Packard Foundation

The Community Foundation's Center for Nonprofit Excellence (CNE) is offering a robust array of workshops to help local nonprofits fulfill their missions. Topics range from fundraising and board development to technology and volunteer management.

OCTOBER

- 29 Planning for Fund Development:
a Workshop for Board Members

NOVEMBER

- 6 Volunteer Recruitment & Management Series
(Full)
- 15 Getting Your Grassroots Story in the News
(Bilingual Workshop)
- 21 Board Chair group meeting

DECEMBER

- 2 Future Nonprofit Trends
featuring Lucy Bernholz
- 5 Introduction to Grant Proposal Writing

COMING 2015

SACT consulting applications due – January

Successful Collaborations – Date TBD

Executive Director Learning Community

BOARD OF DIRECTORS



Gail Delorey, *Chair*
Rick Kennifer, *Vice Chair*
Catherine Kobrinsky Evans,
Secretary
Tina Starkey Lopez, *Treasurer*
Tonya Antle
Ann T. Brown
Ida Lopez Chan
Greg Chilton
Jim Claypool
Stephen Dart
Alfred Diaz-Infante
Patti Hiramoto
Steve McGowan
Kelly McMillin
Ken Petersen
John M. Phillips
Anna Marie Ponce
Raul Rodriguez
Kenneth R. Wright

FOUNDATION OFFICES

Monterey Office
2354 Garden Road
Monterey, CA 93940
831.375.9712

Salinas Office
945 S. Main Street, Ste. 207
Salinas, CA 93901
831.754.5880

info@cfmco.org
www.cfmco.org

www.facebook.com/cfmco 
www.twitter.com/cfmco 



PRO BONO CONSULTING AVAILABLE

Through the Stanford Alumni Consulting Team (SACT), local business school alumni with decades of experience will volunteer their time to work with a small number of nonprofit organizations on business and management issues. Previous projects have covered areas such as: financial systems, board development, marketing and strategic business analysis.

Applications will be online in December and due in January 2015. Contact Kaki Rusmore, Director of the Center for Nonprofit Excellence at 831.375.9712 x124 or kaki@cfmco.org with questions.

"They exceeded all our expectations. The incredible insight and experience they provided, as well as the community contacts we made were outstanding and will help us to catapult our agency to the next level."

– ROBIN MCCRAE, EXECUTIVE DIRECTOR, COMMUNITY HUMAN SERVICES

Visit www.cfmco.org/consulting to learn more.



CFMC grant supports expansion of the Just Run program of the Big Sur International Marathon

INSIDE

Neighborhood Grants
 Girl Leaders Take Action
 Stewardship of a Legacy
 Grantmaking Impact

100 years COMMUNITY FOUNDATIONS

Make the most of your year-end giving

The end of the year is coming fast. You still have time to make a gift and receive valuable tax benefits. Depending upon your goals, a charitable gift made this year can provide you with lifetime income, save taxes on the sale of your property and reduce your taxable income on this year's return.

For those who wish to create or contribute to a CFMC fund to make meaningful difference this year, please contact Dan Baldwin or Christine Dawson at 831.375.9712 to develop a customized plan for your philanthropy.



#GIVINGTUESDAY™

December 2, 2014

#GivingTuesday is an international day of giving that will transform how people think about, talk about and participate in the giving season. Taking place December 2—the Tuesday after Thanksgiving—#GivingTuesday will create a movement around the holidays dedicated to giving vs shopping. You can participate through Monterey County Gives!, add to any fund at the CFMC, or donate directly to the nonprofit of your choice.

MONTEREY COUNTY
GIVES!
 SUPPORTING BIG IDEAS
 FROM LOCAL NONPROFITS

Monterey County Gives!

November 13 – December 31, 2014

Tis' the Season - More than \$1 million was raised in 2013 to benefit local nonprofits through the Monterey County Gives! campaign of the Monterey County Weekly Community Fund. This year 100 nonprofits are participating, each with their "Big Idea" to make Monterey County a better place. Look for a special issue of the Weekly in November and check www.montereygives.com for a fun and easy way to give back. Each gift receives a pro rata portion of matching grant dollars.

The Monterey County Weekly Community Fund is a donor advised fund of the CFMC. Thanks to the Cannery Row Company, Neumeier Pomo Investment Counsel, the David and Lucile Packard Foundation and Whole Foods for their generous support of the match.