

"Here for Good"

Community Foundation field celebrates first 100 years

"Here" Helping those who live here, give here

For 100 years, community foundations have been the hallmark of local philanthropy. At the Community Foundation for Monterey County (CFMC), it is the generous people who live here who give here. With more than 340 funds created by individuals, families and businesses, the CFMC granted nearly \$10 million in 2013. Though fund holders can recommend grants to any 501(c)3 nonprofit regardless of location, the vast majority of grants (85%) are made to agencies serving Monterey County.

Affiliate funds are another example of local giving.

These geographically based funds make grants within a specific region. In February, the CFMC assisted leaders from in and around King City to create the Southern Monterey County Foundation, an affiliate fund of the CFMC (see page 2). The CFMC is also here for families who want to create a legacy for their loved ones, such as the Gomez Family (see page 4).



Christine Dawson (l) and Dan Baldwin (r) assist Lupe Gomez (center) establish the Trinidad Gomez Family fund to honor her late husband.

for "Good" Responding to Community Need

Community foundations have long played a role in responding to disasters from fires to floods. While relief organizations offer support during and immediately following a disaster, community foundations traditionally focus on restoration and recovery efforts. The Big Sur Fire Fund was created by the CFMC for those wanting to support the Big Sur community in the aftermath of the 2013 Pfeiffer Ridge fire. More than \$20,000 in grants have been made so far: \$10,000 to the Central Coast Property Owners Association; \$5,195 to the American Red Cross for disaster relief expenses and \$4,915 to the Big Sur Fire Brigade for fire equipment replacement. The CFMC expects to grant the balance of the fund in the near future.



Big Sur resident battles blaze

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"Here for Good" 100 Years of Making a Difference

In 1914, Frederick Goff, a Cleveland banker and lawyer, believed that by pooling their resources into a single fund, philanthropists in his city could collectively improve the community. A century later, the field has grown to 800 community foundations in the U.S. alone. The CFMC is the steward of \$175 million in charitable assets and looks forward to inspiring philanthropy and strengthening communities for the next 100 years and beyond.



"Southern Monterey County Foundation" Affiliate Fund Formed

Community leaders from Southern Monterey County expressed an interest in giving back to their local area. A dinner was held in October, hosted by CFMC board member Tina Starkey Lopez and former board members Kurt Gollnick and Susan Gill, at Scheid Vineyards in Greenfield. More than 25



Southern Monterey County Foundation organizers include: (l to r) Rich Casey, Mary Orradre, Rob Cullen, Mikel Ann Miller, Tina Starkey Lopez, Peter Anderson, Grace Borzini

people attended to learn about the concept of affiliate funds and ask questions about how it might work. A seed gift of \$50,000 was pledged from the Mike and Mary Orradre fund of the CFMC.

In February, at a follow up meeting at Pacific Valley Bank in King City, hosted by CFMC board member Tina Starkey Lopez, the group voted to create the "Southern Monterey County Foundation."

This affiliate fund of the CFMC is a vehicle for community members to pool their philanthropic assets. A local advisory board will define the grantmaking parameters and help raise funds. The affiliate will benefit from being part of the CFMC's investment pool and receiving philanthropic services such as grantmaking, administrative and back office support.

The group will make grants to organizations serving King City and points south. Any community interested in establishing an affiliate fund, please contact Dan Baldwin at 831.375.9712.

PRESIDENT'S MESSAGE

Growing Local Giving

2014 marks the centennial of our field. The first community foundation was established in Cleveland in 1914. The idea was to create a pool of charitable assets that could respond to changing community needs. Individual donors could still support the causes of their choosing, but by placing assets in this new entity they were creating a fund that provided support outside the interests of a single individual.

As the CFMC entered 2013 we did so with a board-led commitment to be more proactive in our interactions with leaders in Salinas Valley and South County (which we define as Gonzales and all areas south). The Community Foundation for Monterey County's name suggests a countywide mission. But for those of us who live here, we know this is easier said than done.

The most obvious challenge comes from the sheer size of our county and the ability to be physically present (whether programmatically, attending events or meeting with community leaders). Ironically, the uniqueness of these regions, the communities and people therein, while contributing to

“One hundred years later, the idea still has relevance.”

— DAN BALDWIN



Richard Green

the incredible richness of our county, means a steep learning curve for any organization whose mission assumes a deep knowledge of the needs, people, politics, nonprofits and business life of its geographic footprint. King City, Soledad, San Ardo, Lockwood, Greenfield.....a first mistake would be to assume a one-size-fits-all approach to engaging these communities.

So we embarked on a multi-faceted approach. I, and other CFMC staff, met with leaders up and down the valley. Mayors, nonprofit heads, donors, professional advisors. With the help of the CFMC board, we attended many more events, Rotary clubs, receptions and community meetings. We commissioned a nonprofit "landscape study" that enhanced our knowledge of the organizations, demographics, needs, service providers and gaps in this part of the county (*see page 6*). As the year progressed, leaders in King City began to express a desire for a partnership with the CFMC that would provide more structure for their local philanthropy.

What has emerged is the formation of the Southern Monterey County Foundation, an affiliate fund of the Community Foundation for Monterey County. Affiliates are geographically based funds, guided by advisory boards, that get the full back-of-the-house grant and administrative support of the CFMC. They help local communities pool philanthropic assets and then deploy them to areas of greatest need and impact.

It turns out what was good for Cleveland in 1914 is good for southern Monterey County in 2014. My hope is that as we share this development it will prove to be good for other Monterey County communities as well. We are, after all, *Here for Good*.

Legacy of Giving Luncheon Inspires

“ Legacy giving makes a difference for future generations

— JULIE PACKARD

More than 180 turned out for the annual Legacy Society luncheon which took place February 11 at the Monterey Peninsula Country Club. Legacy Society members, professional advisors and friends came to celebrate the “Legacy of Giving.” 2014 Board Chair Gail Delorey welcomed guests and President/CEO Dan Baldwin gave a first glimpse of 2013 accomplishments and spoke about the impact of legacy giving.



(l to r) CFMC Board Chair, Gail Delorey, Dan Baldwin and Julie Packard spoke about legacy giving

Keynote speaker, Julie Packard, Executive Director of the Monterey Bay Aquarium, gave an inspiring talk. She described her father’s legacy in creating the Monterey Bay Aquarium, and added that it is by each of us doing

our part in our own communities that we will make a difference for future generations.

Wine compliments of



(l to r) Jennifer Walker, Liza Horvath and Frances Gaver



Fund holders Peter and Anne Thorp



(l to r) Barry and Nicole Kilzer, Rod and Sue Dewar

Photos by Richard Green

Monterey County Gives! Surpasses \$1 Million

More than \$1 million, \$1,066,411 to be exact, was raised to benefit 93 local nonprofits through the Monterey County Gives! Campaign of the Monterey County Weekly. The campaign was the most successful ever, and thanks to a matching fund



pool of \$130,000, the nonprofits received a 14% increase for each dollar raised up to \$50,000. This year was the first year that individual donors added challenge grants to the program. The CFMC provided additional grants of \$1,000 each to the Food Bank for Monterey County for the most donors and the International School of Monterey for the most donors under 35. An additional \$2,500 was awarded to the Center for Photographic Arts for the Ingenuity Award for their “Big Idea” of PIE (Photography, Imagination, Experience). PIE is a collaborative series of conferences, labs and gatherings exploring the creative process and imaginative thinking. The CFMC’s Women’s Fund was honored to receive \$60,500 in contributions.

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

Women’s Fund LUNCHEON

Why Stop Here? Fueling the Potential of Women & Girls

Friday, May 9, Hyatt Regency, Monterey

More than 400 supporters will come together to be inspired and give to the Women’s Fund. Please note the event will be a luncheon rather than a breakfast. Are you interested in becoming an event sponsor? Please contact Christine Dawson at 831.375.9712 x126. Register at www.2014WomensFundLunch.eventbrite.com



Keynote speaker Nicole Vazquez, Chair, Board of Directors, Women’s Foundation of California

women’s fund

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



SPEAKER SPONSOR

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MONTEREY COUNTY gives! 2013
Supporting big ideas from local nonprofits



Lupe and Trini Gomez at his surprise 90th birthday celebration at the National Steinbeck Center

Richard Green

FUND HOLDER PROFILE

Trinidad Gomez Family Fund

Trinidad "Trini" Gomez, left school at age 12 to help support his family as they followed the crops and worked the fields. He later served in the Army in WW II and returned to settle in Gonzales to raise his own family. He was one of the first employees of Growers' Exchange, Inc. Hired as a field supervisor, he was still working at the Nunes Company more than 50 years later, most recently in personnel administration. He died last year at age 93. Through his many years of hard work and saving for the future, he left his family resources which enabled them to create the Trinidad Gomez Family Fund.

Trini's life can be defined by love of agriculture, second only to his deep love of family. He and his wife of 67 years, Lupe, enjoyed working together in their garden at home. To honor his love of those two areas, their daughter Patricia Gomez, who served on the board of the Community Foundation San Luis Obispo County, knew that community foundations could help identify opportunities for them to give in their father's name. "Because community foundations are good stewards of the funds invested and a very good resource for knowing the agencies that are serving the needs and enriching the community, it became a real easy decision for the family," said Patricia.

The fund is truly a family affair. With the help of the CFMC the four children look forward to learning more about the community while assisting their mother in recommending grants in agricultural education and other areas that were important to their father. Patricia notes that Lupe particularly "likes the idea that the fund will always be there honoring him and will give back to the community in perpetuity." Though creating the fund was an emotional experience, the family went home and popped a bottle of champagne to celebrate the life and legacy of the man they all loved.

“the fund will always be there honoring him and will give back to the community in perpetuity.” —PATRICIA GOMEZ

NEW FUNDS ESTABLISHED*

DONOR ADVISED

The Corwon Fund
Trinidad Gomez Family Fund
Wiegand Family Foundation

SCHOLARSHIP

The Larry Horan-Jim Langley Cal Alumni Memorial
Scholarship Fund

AGENCY FUNDS

Carmel Valley Kiwanis Foundation Stewardship Fund
Monterey History and Art Association Endowment Fund

FIELD OF INTEREST

Big Sur Fire Fund

The CFMC manages more than 340 funds established by individuals, families and businesses. To learn more, please contact Dan Baldwin or Christine Dawson at 831.375.9712.



(l to r) Shannon Damnavits, Sandra Dewey and Lowel Figen enjoy Legacy Society Luncheon

Richard Green

New Legacy Society Members*

Arlene Barr

Brian Thayer

Arlene Barr and Brian Thayer join seven other CFMC staff members who have chosen to join the Legacy Society.

*Since October 2013

CNE STRENGTHENS NONPROFITS

\$80,000 David and Lucile Packard Foundation Grant Boosts Offerings

The Community Foundation's Center for Nonprofit Excellence (CNE) recently received an \$80,000 grant from the David and Lucile Packard Foundation to support 2014 activities, including \$25,000 for Organizational Development grants. Some of the Center's activities to be supported include:

- a three part seminar on fund raising for capital campaigns,
- a new program to strengthen small, largely volunteer organizations,
- an Executive Directors' peer learning group,
- workshops to address the needs of South County organizations, and
- a strategy to help organizations assess and improve their technology.



Julie Drezner, CFMC VP Grants & Programs (front) and ((l to r) Owen David, CF Santa Cruz County, Paul Levy and Stephanie Hicks, CF for San Benito County, Christina Cuevas, CF Santa Cruz County and Kaki Rusmore, Director Center for Nonprofit Excellence, welcome CLP grantees

CNE's other upcoming activities include the fifth LEAD Institute,

preparing fifteen emerging nonprofit leaders from Monterey, Santa Cruz and San Benito Counties for greater leadership responsibilities. CNE also continues to facilitate training and peer learning for the Futer Essential Human Services grantees, in their three-year program to strengthen sustainability and internal capacity. And, CNE coordinates support to grantees of the Community Leadership Project (CLP), a tri-county collaboration of community foundations focused on strengthening organizations providing services to low-income communities of color. For more information, visit www.cfmco.org/cne.

Charitable Gift Annuities & Your Nonprofit

Income for today, a gift for tomorrow — FREE workshop

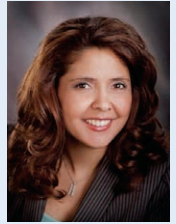
April 10, 2014 (8:30 coffee and networking; 9:00-10:30 workshop)
Community Foundation for Monterey County, 2354 Garden Rd., Monterey

This free workshop for nonprofit development staff will explain the benefits of a Charitable Gift Annuity (CGA) and how the Community Foundation can partner with you to make CGAs available to your donors.

REGISTER at www.cfmco.eventbrite.com.

CFMC Welcomes New Board Members

Ida Lopez Chan, Salinas Branch Manager, Rabobank, joined Rabobank in 1997, was named manager of the Soledad branch in 2004 and manager of Salinas branch in 2010.



Chan earned her BS degree in business administration from CSU Fresno and is a graduate of Pacific Coast Banking School. A lifelong resident of southern Monterey County, she has served as president of Soledad Rotary and on the board of Soledad Community Health Care District.

Patti M. Hiramoto, Ed.D. AVP of Inclusive Excellence & Chief Diversity Officer

CSU Monterey Bay, has over 30 years of experience in university administration. In 2009, she became



Chief of Staff to the President at CSU Monterey Bay where she also served as VP of University Advancement and her current position. Dr. Hiramoto earned a BA in Architecture from UC Berkeley, an MS in Counseling from San Francisco State University and an Ed.D. in Higher Ed Administration from UC Berkeley.

Raul C. Rodriguez, La Plaza Bakery Manager & Greenfield City Council Member, grew up in



Soledad and attended Gonzales High School and Hartnell College. He completed his degree at UC Berkeley and taught middle school English for 10 years at the same middle school he attended. He is part of the family business at La Plaza Bakery in Greenfield (one of six locations). He serves on the Greenfield City Council, the Greenfield Rotary Club and the Greenfield Chamber of Commerce.

South County Nonprofit Landscape Study

In Fall 2013 the CFMC undertook a study to deepen its understanding of the nonprofit organizations serving the region and strengthen our combined efforts towards a vision of healthy, safe vibrant communities.

We identified and surveyed 320 nonprofit, government, faith-based and civic organizations and conducted five focus groups with 53 leaders to discuss local assets and challenges. We learned that locally-based nonprofits are under-resourced, with smaller budgets and fewer staff, though they serve more residents in the area than nonprofits based elsewhere.



The San Ardo meeting was one of five South County focus groups

Strengths include a core of dedicated staff, volunteers and donors who step up to solve community problems, while challenges are infrastructure, long-range vision, fundraising, technology and large geographic distances.

Leaders want to see more opportunities for youth development, coordination to connect organizations, stronger long-term commitment by outside organizations as well as expansion of philanthropic resources in the region. The CFMC plans to continue to make South County a priority in its grantmaking, provide nonprofit trainings and work with community leaders and nonprofits to make a positive difference.

To download a copy of the report, visit www.cfmco.org/southcountystudy.

In addition to conducting the landscape study, the CFMC:

- granted \$630,000 to 37 nonprofit organizations serving South County in 2013, and
- was named 2014 South County Nonprofit of the Year by the Greenfield Chamber of Commerce.

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.

The Heritage Society of Pacific Grove

\$8,500 Community Impact grant towards restoration of the Pt. Pinos Lighthouse

The Heritage Society of Pacific Grove was founded in 1975 to preserve the historical background and architectural resources of Pacific Grove. This all-volunteer run organization holds events, photo contests, fundraisers and produces historic home plaques, publications and a lecture series to celebrate local heritage. Since 2006, they have managed the operations of Pt. Pinos Lighthouse. Founded in 1855, it is the oldest continuously operated lighthouse on the West Coast and registered on the

National Register of Historic Places. The CFMC grant helped to support access to the lighthouse for visitors with disabilities. The facility is now ADA accessible and available to the public for events, tourism and educational activities. When the Heritage Society took over operations, the lighthouse was deteriorating at a rapid rate but now the oldest building in Pacific Grove has since been restored for future generations.



The Pt. Pinos Lighthouse is now more accessible to visitors

Harmony at Home

\$50,000 Community Impact grant (over 2 years) to pilot a new bullying prevention program

Harmony at Home (HAH) is a nonprofit organization that focuses on the prevention of childhood trauma from violence in families and communities. HAH currently runs a school-based counseling program, classes for families, a teen summer camp and distributes a handbook for parents and caregivers of children exposed to domestic violence. The CFMC grant supports a three-year, evidence-based pilot program on bullying prevention at Los Padres Elementary School in Salinas. The program will impact 767 kindergarten through 6th grade students to reduce bullying and improve peer relations. The program involves parents, teachers, students and all school staff to increase awareness of the bullying problem, develop clear rules against bullying and provide support and protection for victims. This program has proven results and the goal of the pilot project is to set up a model for success for other schools in Monterey County.



Students of Los Padres School participated in Harmony at Home's anti-bullying campaign

IMPACT

Youth Music Monterey County

\$10,000 Community Impact grant to support musical education and performing opportunities for youth in Monterey County



Bradley musicians enjoy the musical magic of the upright bass

Vanisha Douvan

Youth Music Monterey County (YMMC) was founded in 1988 to provide young people with opportunities to participate in, and gain greater understanding of, music and its performance. Approximately 100 students ages 8-20, from 33 schools in Monterey County, participate annually in the Junior Youth and Honors Orchestras, performing classical and modern music. YMMC also has a chamber players program, a small group that performs throughout the county and serves as advocates for music programs.

Their South County Strings program reaches underserved communities in South Monterey County through a free in-school music program

to additional students who would otherwise have no access to music education. The CFMC supports the general operations of all these valuable programs. Research has shown a direct relationship between music education and academic achievement. Organizations like YMMC have stepped up to keep access to music education available to youth despite the erosion of school funding.

Lideres Campesinas

\$18,000 Community Impact grant to provide community-building skills for women farmworkers

La Organización en California de Lideres Campesinas, Inc. (Women Farmworker Leaders' Organization of California) was awarded an \$18,000 grant to provide leadership training for women who work in agriculture through its Campesina (farmworker woman) Policy Institute.

The Campesina Policy Institute will train women from Greenfield, Salinas, and King City on how to develop community awareness campaigns, and to inform policy and decision makers about the needs of farmworker women and their families around mental health, the public education system, and delivery of social services.

The Institute will include half-day training seminars over a six-month period followed by a local campaign to raise community awareness on sexual harassment, domestic violence, and/or pesticide exposure. The program will provide much needed leadership and community-building skills for women in the farmworker community.



Photo by Kristen Fletcher

Members of Lideras Campesinas celebrate One Billion Rising for Justice on February 14, a global movement to end violence against girls and women

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Keynote speaker, Julie Packard, inspires guests at Legacy of Giving luncheon



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INSIDE

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Stories of Impact

100 years COMMUNITY FOUNDATIONS

Board Transformation Toolkit

Take your nonprofit board to the next level

Free toolkits developed by the Center for Nonprofit Excellence are now available online. They provide the groundwork for boards to learn new skills, reflect on their strengths and plan steps to become even stronger. If you want a strong, cohesive board, effective methods to guide your organization, and have limited funds for board training or consultants, these resources are for you.

The toolkits are designed to be used by board members, with board members. By making the board's work easier and more effective, you will help your nonprofit have greater impact in the community and deliver on your mission. Learn more at www.cfmco.org/toolkits.


New Member
Recruitment
& Orientation

Successful Board Recruitment & Orientation April 17, 5:30–7:30 PM

Learn from a panel of local nonprofit board members and see two of the toolkits demonstrated. Receive downloadable templates you can use now.

\$15 includes light supper
Community Foundation for Monterey County
945 S. Main St, Suite 207, Salinas

REGISTER at www.cfmco.eventbrite.com



BoardConnect

Connecting Qualified, Committed
Individuals with Nonprofit Boards

April 23, 2014 5:30-7:30, FREE
Hartnell College, Salinas

Considering board service? Meet 25 nonprofits at this lively reception with a job-fair atmosphere. BoardConnect is coordinated by the Volunteer Center of the United Way Monterey County, the Center for Nonprofit Excellence, Leadership Monterey Peninsula and Leadership Salinas Valley.

Advance registration required at:
www.volunteermontereycounty.org
For more information, call 831.649.8252.

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