



FALL 2016



(l to r) Steve John, CEO, Monterey Peninsula Foundation, Dan Baldwin, President & CEO, CFMC, Bradley Zeve, Founder & CEO, Monterey County Weekly

MC GIVES!

Ready, Set, Give!
Nov. 10 - Dec. 31, 2016

Monterey County Gives! demonstrates the power of partnership. Funders, donors and nonprofits all join forces to make the community better. Started by the Monterey County Weekly in 2009, Gives! provides a vehicle to inspire local philanthropy at all levels. By sharing the "Big Ideas" of participating nonprofits, more than \$8 million has been donated since 2009 to improve our communities.

"Anytime our community comes together and manifests its best, we all benefit and can celebrate. We are discovering, on a local level, the power of collaboration."

—Bradley Zeve, Founder & CEO, Monterey County Weekly

This year 125 participating nonprofits will receive a pro rata percentage match for each dollar raised up to \$75,000. Visit www.montereycountygives.com November 10 through December 31 to help your year-end gift go further and leverage the power of partnership.



The Monterey County Weekly Community Fund is a donor advised fund of the CFMC.

Soberanes Fire Inspires Community Philanthropy



(l to r) CFMC staff Christine Dawson, Lynn Bentaleb with Patte Kronlund and Lisa Kleissner of CPOA

"The partnership between CPOA and CFMC has been seamless. It was CPOA's intimate knowledge of community and landscape and CFMC's fundraising capability which has allowed meaningful immediate relief. As we move into the recovery phase, (we) intend to work closely together to leverage donated funds in an effort to realize the maximum benefit for the greatest number of folks impacted by the fire."

—Patte Kronlund, CPOA

One of the most important facets of private philanthropy is the ability to be responsive to community need. In the case of a disaster, natural or manmade, this is critically important. The Community Foundation for Monterey County (CFMC) was able to create the Soberanes Fire Fund just three days after the fire was ignited by an illegal campfire in Garrapata State Park. At press time, with more than 126,000 acres destroyed, donors have responded. More than \$630,000 has been raised to support relief, rebuilding and recovery efforts.

The community response has been broad and deep. Donations have poured in from individual donors and companies supporting fundraisers from the Monterey Bay Aquarium and Downtown Dining, Cultura to Chipotle, golf events, pancake breakfasts, wine tastings, concerts, artists and auctions. CFMC social media is abuzz with activity as we share opportunities to give. "It's about people helping people," says CFMC President/CEO, Dan Baldwin.

Staff researched the best ways to support those who were evacuated or lost their dwellings. A special grant committee including local residents and CFMC board members has been formed. Over \$250,000 has been granted to Mid-Coast Fire Brigade and Coast Property Owners Association (CPOA) to assist Big Sur residents, and to Community Emergency Response Volunteers (CERV) of the Monterey Peninsula to assist those in the Cachagua, Tassajara, and Jamesburg communities.

The CFMC hosted a stakeholder meeting with more than 30 people representing the CPOA, Mid-Coast Fire Brigade, American Red Cross, Monterey County Office of Emergency Services, United Way 2-1-1, county and state representatives and volunteer organizations. All agreed that we are in this together for the long term.



Fire relief benefit at Monterey Bay Aquarium

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NMCF supporters: Standing (l to r): Don Chapin, Linda Grier, Anne Herendeen, Karen Miller, Joe Pezzini, Leslie Austin, John Phillips, Rich Coffelt. Seated: Nancy Ausonio, Lou Calcagno

Northern Monterey County Foundation Launched

For several months, community members living in North Monterey County have been working towards forming a new way to support the area they call home. These efforts, led by Nancy Ausonio, Don Chapin and Monterey County Supervisor John Phillips, proved successful as the Northern Monterey County Foundation (NMCF) was launched in August. \$100,000 has already been pledged.

The purpose of the NMCF is to build a permanent endowment that will provide grants to support projects and programs serving the communities of Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, Prunedale, Royal Oaks and Santa Rita. "North County is a special place," said Don Chapin, "and the Northern Monterey County Foundation will be a way for all of us to strengthen our communities now and into the future."

The Northern Monterey County Foundation is governed by an advisory board of residents who have a deep understanding of community needs and appreciation for the region, and will make the decisions on how funds are raised and grants distributed. The Advisory Board will initially be chaired by Don Chapin, and includes Nancy Ausonio, Leslie Austin, Ricky Cabrera, Lou Calcagno, Anne Herendeen, Karen Miller, Manuel Osorio, Joe Pezzini and John Phillips.

As an affiliate fund of the Community Foundation, the Northern Monterey County Foundation also seeks to inspire philanthropy and be a catalyst for strengthening communities. It will benefit from being part of the CFMC investment pool, and will receive administrative support around its efforts to grow, provide grants and make a positive impact in North County.

PRESIDENT'S MESSAGE

Busy for Good

A colleague at another community foundation tells his co-workers that if they're ever asked how things are going, don't reply with "busy." He reminds them that we're paid to be busy. Donors, board members and our friends in the community expect us to be busy. I think what he's really saying is don't sigh, look to the sky, roll your eyes and say, "I'm so busy."

Histrionics aside, we're busy, but in very good ways. The Soberanes Fire Fund has dominated our attention for the past couple of months, and will continue to do so for some time. Community support has been amazing, and we're honored that so many are trusting the CFMC as the repository for their gifts. While the entire staff has had a role in working on this fund, Program Officer Lynn Bentalieb has done an outstanding job in identifying grant partners who are working directly with affected families.

We're thrilled to be working with our friends in North County, as they have formed our newest affiliate fund, the Northern Monterey County Foundation. Once this concept was presented, a three-person leadership team of Don Chapin, Nancy Ausonio and John Phillips moved it forward quickly. Money has been raised. A full advisory board has been formed, and grantmaking will take place in the near future. Simply remarkable.

Our Center for Nonprofit Excellence (CNE) is rolling out a much needed program to build capacity in small nonprofits. It's called Next Steps. It was conceived by Kaki Rusmore, the CNE's director. It will help organizations develop important infrastructure for sustaining their operations. It requires a three-year



Dan Baldwin visits Soberanes fire scene at Palo Colorado

Photo by Bradley Zere, Monterey County Weekly

commitment by the nonprofits, so the prospects are good for producing lasting results.

The CFMC has been engaged in the issue of homelessness for several years. The Fund for Homeless Women has done an incredible job of raising awareness on a chronic, human issue. (The recently issued report on *Homeless Women on the Monterey Peninsula* illustrates the challenges and level of work needed to make a difference.) Additionally, we've been working behind the scenes to support agencies (County, City of Salinas, Coalition of Homeless Service Providers) engaged in Salinas' Chinatown which has become home to our county's most visible, if not largest, homeless population. Our efforts have been to support an alignment of energy and resources so that everyone's work and best intentions are coordinated.

New funds. Monterey County Gives! around the corner. Scholarships. Fall grant cycle. Donor education events. Professional advisor council. Yes, we're busy... busy serving the interests of Monterey County philanthropy, and delivering resources to agencies making a difference. I wouldn't have it any other way.



Samantha Cabaluna (center) presents a donation from Earthbound Farm to Dan Baldwin and Laurel Lee-Alexander

Soberanes Fire, continued from page 1

We are grateful to everyone who has responded with donations from \$5 to \$20,000 from California to New York. The fire remains an ongoing disaster so needs will be assessed and funds deployed carefully to help with both relief and circumstances that may emerge.

For more information on the Soberanes Fire Fund and grantmaking, please visit www.cfmco.org/SoberanesFire.

Church Brothers – True Leaf Farms

Investing in Education through Scholarships

Investing in the education of children of employees is “just the right thing to do,” says Brian Church, owner of Salinas-based Church Brothers – True Leaf Farms.

The family-run produce, grower/processor and shipper has begun making a close-to-home investment in the future of its workers by establishing a scholarship fund at the CFMC to help children of eligible employees afford college or technical training.

“The scholarship is geared to supporting the field workers’ children’s education – it’s a way to give back, to take care of our workers without expecting anything in return,” said Church.

In its first year the Church Brothers - True Leaf Farms Scholarship Fund awarded \$35,000 to 14 students with a variety of educational goals, including medical school, an undergraduate degree, and auto mechanic certification. Students will use their scholarship money to attend Cal Poly San Luis Obispo, University of California, Santa Cruz, California State University, Monterey Bay, Arizona State University, Gavilan Community College, and Universal Technical Institute and others. The fund will grant \$100,000 annually.



Family Farming



Grower Owned Processor

“I appreciate that Church Brothers is trying to help make my dream of going into the medical field a reality,” said Gabriela Rubio, a scholarship recipient who is attending the University of California, Santa Cruz. “It is with the generosity that companies like Church Brothers display that students feel the support to aspire to great things,” she said.

CFMC staff worked with the leaders of Church Brothers - True Leaf Farms to create scholarship criteria, translating materials into Spanish, and publicizing the scholarship to eligible employees and their children. CFMC then collected the applications, verified



“The scholarship is a way to give back, to take care of our workers without expecting anything in return.” –Brian Church

Church Brothers-True Leaf Farms owners: Back (l to r): Jeff Church, Vince Brigantino, Tom Church. Middle (l to r): David Gill, Brian Church, Jay Brow, Steve Church. Front (l to r): Neil Milburn, Tim McAfee

student eligibility, helped screen applicants, and managed the process of disbursing the scholarships to each student’s school.

“It was a big idea made easy working with the Community Foundation,” said Maria LeRoy, Vice President of Human Resources for the company. “It was a task we had to get right - it had to be easy for the employees to access and it is,” she said, adding that the company’s legal advisors recommended the CFMC.

For information about the Church Brothers-True Leaf Farms Scholarship go to: www.cfmco.org/ChurchBrothers_TrueLeaf.

Many people start scholarship funds to memorialize a loved one or support students in a certain field of study. Others entrust the CFMC with the responsibility of finding and selecting students with the highest need and potential to succeed in higher education. For information about setting up a scholarship fund visit www.cfmco.org/scholarships.

The CFMC holds more than 30 named scholarship funds, with a total value of nearly \$6 million. Each year, these funds award over \$300,000 for the benefit of about 70 students throughout Monterey County. Our scholarship funds are established by individuals, families, and businesses who recognize the value of education.

New Funds Created*

The CFMC manages more than 400 charitable funds established by individuals, families and businesses. To learn more, please contact Dan Baldwin or Christine Dawson at 831.375.9712.

Affiliate Fund

Northern Monterey County Foundation

Designated Fund

King City Recreation Commission Forden
Park Playground Fund

Donor Advised

Bright Futures Fund
Chip Hooper Foundation
Barbara Paul and Tom Lafaille Fund
Lehman Family Fund
Pagnillo Family Fund
Nicholas M. Pasculli Fund
Dr. James Valentine Fund
Vallentin Fund
Marsha McMahan Zelus Fund

Field of Interest

Shirley I. Thackara Fund
Soberanes Fire Fund

General Endowment

Evelyn Torres Fund



2nd & 3rd generation Tottino family: Karen, Cathy, Dolores, Hugo, Michele, David & Les

Scholarship

Bonnie Hutcheon Scholarship Fund
CHISPA Scholarship Fund
Church Brothers-True Leaf Farms
Scholarship Fund
College Futures Foundation Fund
Libby Olver Scholarship Fund
GHGH Scholarship Fund
Hugo and Dolores Tottino Family
Scholarship Fund
Jack Van Zander Cal Alumni Memorial
Scholarship Fund

Stewardship

Big Sur Land Trust Carmel River FREE
Stewardship Fund
CHISPA Stewardship Fund
Friends of Carmel Forest Stewardship Fund
Friends of Laguna Seca Capital Campaign
Gathering for Women Capital Campaign Fund
Legal Services for Seniors Stewardship Fund

*Since March 2016

Women's Fund Donors Support Scholarships

The CFMC's Women's Fund donors are committed to putting women and girls onto a path of economic security through education. When the new Girls' Health in Girls' Hands (GHGH) Scholarship program was announced at the 11th annual Women's Fund luncheon in May, more than \$53,000 was raised.

This enabled the CFMC to award 17 inaugural scholarships for graduating high school seniors or current college students who participated in the six GHGH partner agency programs. Each eligible applicant may receive up to \$2,500 in scholarship money to support her higher education tuition or related costs.

"I was so happy and grateful to receive this scholarship. It will go toward my tuition for UC Berkeley. After I graduate I plan to enroll in the Master's program and then became a Spanish Professor. Thank you for this opportunity and for making my economic burden less stressful."



— GHGH Scholarship recipient, Bella Chavez

"Women's economic security is directly related to education," said Tonya Antle, CFMC board member and chair of the Women's Fund Leadership Council. "Helping build a path towards higher education will improve the quality of life for women, their future families and our community," she said.

For more information, visit www.cfmco.org/ghgh or www.ghghmonterey.org.

GHGH is a collaborative program of the Monterey County Health Department in partnership with the Boys & Girls Clubs of Monterey County, Girls Inc. of the Central Coast, Monterey County Rape Crisis Center, Planned Parenthood Mar Monte and the YWCA Monterey County. It was created by the Women's Fund of the Community Foundation for Monterey County.

GRANTMAKING

Community Impact grants make a meaningful difference for many people and communities throughout Monterey County. To see more recent grants, please visit www.cfmco.org/communityimpactrecent.

Children & Youth - The Epicenter \$15,000 for its youth-led community center serving transition-age foster youth



The Epicenter is an entirely youth-led effort. It began in 2014, when nine founders took an inventory of the county to see what was feasible to help those transitioning out of the foster care system. They expressed the desire for a place where they are seen as part of the solution, not the problem. "There was a large population aging out of systems of care and many were not familiar or able to access resources available," said Gary Vincent, Epicenter Executive Director.

The founders brought VOICES to Monterey County, a national youth-led model for transition-age foster youth. Grant funds will be used to engage current and former foster youth in creating opportunities to

address their education, employment, housing and wellness needs, pilot new program elements, and provide services to at least 400 youth. Adult and peer coaches will support transition-age youth to develop and implement goals for independent, healthy and productive lives.

Health & Wellness - Door to Hope \$35,000 for a new electronic health records system



Door to Hope (DTH), founded to provide treatment to low income women suffering from substance use disorders, is now one of Monterey County's leading providers of behavioral health services.

The Salinas-based nonprofit has evolved to provide drug and alcohol recovery services to those in need, but keeping up with the health industry's methods of tracking service delivery has proved daunting. A \$35,000 grant will help with costs associated with implementing an

electronic records system and the first year's costs of running the system. The CFMC grant is just a portion of the expense, with other foundation's such as The Harden Foundation also supporting the project.

"If you go to the hospital—your records for the most part are kept electronically, that's the standard now," said John de Miranda, DTH's Associate Director. "The big hospitals can afford the systems, but the smaller nonprofits just can't afford the costs to be in the game. This is a business necessity—people don't tend to think about the business end of service delivery."

IMPACT

Arts & Culture - Monterey Jazz Festival \$25,000 for Traveling Clinicians program & YOSAL partnership



Photo by Craig Lovell

Having a world-class music festival each year presents a unique opportunity to build collaborations not just musically, but educationally. The Monterey Jazz Festival brings renowned acts to Monterey each September. The musicians who come have the power to inspire music appreciation.

A \$25,000 grant will focus on updating the festival's Traveling Clinicians Program and a partnership with Youth Orchestra Salinas (YOSAL). The program aims to broaden the reach of music education to more diverse ethnic, cultural and economic communities.

"The Traveling Jazz Clinicians Program helps fill a gap in Monterey County school music programs,"

said Colleen Bailey, The Monterey Jazz Festival's Managing Director. "It brings the world of jazz into classrooms so students can experience the music directly."

Professional musicians work in local schools free of charge. Teams of seven are dispatched to provide inspired, hands-on teaching workshops. The musicians teach middle and high school students about jazz music and theory and develop the students' ability to work together, play the rhythms and language of jazz, and express themselves through improvisation.



Animal Welfare – Peace of Mind Dog Rescue

\$13,000 for medical exams/care

Pets can be like family. When they get sick, worry takes over and owners want to do all they can to get them well. Pet care, however, is expensive, especially for those on fixed incomes. "For a lot of people, their pet is their reason for living, their most important thing in their life," said Carie Broecker, Executive Director of Pacific-Grove based Peace of Mind Dog Rescue. "But if you are homeless, or on a fixed income you don't have the money to afford a veterinarian."

A \$10,000 grant to the Peace of Mind Dog Rescue's "Helping Paws" program has been assisting low income pet owners pay for healthcare for their aging pets. "The need is great but we are lucky enough to live in an area where there are a lot of individuals and foundations that see the value of animals, the human-animal bond and what animals do for people," she said. Last year the Helping Paws Program was able to assist 50 people afford pet exams, by offering up to \$250 to those in need.

"The need is great but we are lucky enough to live in an area where there are a lot of individuals and foundations that see the value of animals, the human-animal bond and what animals do for people." – Carie Broecker, Executive Director, Peace of Mind Dog Rescue

Grants Strengthen Neighborhood Groups

Gabriel Trujillo is only 18, yet the North Monterey County High School graduate has ideas about wanting kids in his small community of Castroville to think big about higher education. The Castroville Midnighters Car Club has taken local students to visit Stanford University, UC Berkeley, San Jose State and UC Davis. More college tours are in the works, as the Club is among 12 neighborhood groups awarded grants as part of the 2016 Neighborhood Grants Program (NGP).



"We want to open kids' eyes to show that they can go to college too." – Gabriel Trujillo, NGP Grantee Castroville Midnighters Car Club (right)

Recently, grassroots groups from throughout Monterey County gathered to celebrate their awards. A total of \$35,000 was granted in ranges of \$1,500 to \$4,000. NGP grants encourage residents who come together to improve their communities. The program also offers leadership assistance throughout the year.

2016 grantees include Mexican and Korean cultural groups, an environmental food justice group, and volunteers dedicated to providing school supplies to students in Gonzales. One group, "Mountain Bike Mondays," wants kids to simply get off the couch and get outdoors on their bikes. "It's just fun," said Kelly Damschen, a math teacher at Buena Vista Middle School in Salinas, who provides instruction.

For more information, visit www.cfmco.org/ngp.

Charitable Remainder Trusts

A CRT is a vehicle into which donors place assets and in return receive income. The remainder ultimately benefits the causes of their choice.



How It Works

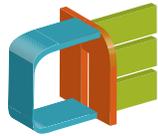
- You can give cash, appreciated stock, closely held stock, real estate or other assets.
- You avoid capital gains tax and receive a charitable income tax deduction for donating assets into the CRT.
- You receive a stream of income during your lifetime, a portion of which may be tax free. Payments may be fixed or variable. The minimum annual percentage payout is 5%.*
- The “R” in CRT is the remainder. When the CRT is established you decide how you want the remainder to be used. It must go to charity. Upon your death, the remainder of the trust creates a fund at the CFMC that can benefit the agencies of your choosing. It can also create a donor advised fund that your designee (usually the kids) can oversee. The fund can be in your name or in honor of any person you choose.
- The fund created is endowed (permanent) and a percentage of the fund is available for granting annually. It becomes a permanent philanthropic resource helping to do good work forever.

CRTs at the Community Foundation are expertly administered by Kaspick & Company. CRTs are their own legal entity. While not complicated, they should be set up by an attorney.

Contact Dan Baldwin or Christine Dawson at 831.375.9712, or visit www.cfmco.org/plannedgiving for more information.

**All CRTs must meet a standard that assures a reasonable remainder will be left for charity.*

Small Nonprofits Receive Grants, Support \$480,000 Awarded through “Next Steps for Small Nonprofits”



center for nonprofit excellence
COMMUNITY FOUNDATION FOR MONTEREY COUNTY

Many smaller nonprofits in Monterey County have a track record of delivering strong programs, but have not had the resources to strengthen their infrastructure. Next Steps for Small Nonprofits will help make that possible for nine local organizations.

“These small organizations are often providing services no one else does,” says Kaki Rusmore, Director of the Center for Nonprofit Excellence (CNE). “We wanted to provide support that fits their unique needs, strengths and aspirations.”



Hope, Horses & Kids

Over half of nonprofits nationwide have budgets under \$100,000, and Monterey County is no different. To help serve these organizations, the CNE developed Next Steps based on CFMC’s successful programs with similar services. The CFMC has committed over \$480,000 to the program with support from The David and Lucile Packard Foundation and the Claire Giannini Fund.

Next Steps is unique in that it offers three-year grants for operating support plus an organizational assessment, training, coaching and opportunities to learn from similar nonprofits. With board members, staff and volunteers committed to learning and change, significant positive steps can be taken in fund development, strategic planning, building the board, technology, and other elements of a thriving nonprofit. The training developed for Next Steps will be open to other small nonprofits countywide. Next Steps grantees are:

- Big Sur Education Council
- Gathering for Women
- Hope, Horses, & Kids
- Interagency Autism Consortium
- Monterey Bay Fisheries Trust
- Monterey County Pops!
- Multiple Sclerosis Quality of Life Project
- Orchestra in the Schools
- The Parenting Connection of Monterey County

Groups Learn To Engage Volunteers

When time, space, expertise, technology and money are all in short supply, some of our community’s greatest resources are the skills of volunteers. Through a partnership with the Volunteer Center of Santa Cruz County, California Volunteers and Points of Light, eight Monterey County nonprofits recently came together to learn and develop their ability to make the most of volunteers.

Service Enterprise Participants:

Access Support Network, Forest Theater Guild, Oldemeyer Center, Planned Parenthood Mar Monte - Monterey Chapter, Return of the Natives Restoration Education Project, Salinas Valley Fair, Sol Treasures, United Way of Monterey County

The free trainings, coupled with consultation, are part of a proven national program to leverage the skills of volunteers. “Organizations that engage volunteers are equally as effective as their peers without volunteers, but at almost half the median budget,” (TCC Group). In addition to in-kind support, the initiative received an Opportunity Grant from the CFMC to extend the program to Monterey County. Organizations that complete the training will receive certification as a Service Enterprise.



Service Enterprise Training

Donor Education: “Good vs. Good”



Betsy Buchalter Adler shares her expertise on giving well

CFMC donor advised fund holders are invited to “Good vs. Good.” Betsy Buchalter Adler will lead a two-part conversation on how donors choose among the many good potential destinations for their gifts of time and money, and how we can strengthen our own giving skills. Participants are encouraged to attend both sessions, but each session can stand on its own.

Wednesday, November 16, Session 1, 9:30 AM – 11:00 AM Learn how a variety of philanthropic icons – from Rockefeller and Carnegie and Bill and Melinda Gates to others who have pledged to give at least half their wealth to charity at www.givingpledge.org – chose what to support. Attendees will identify some recurring themes and consider how they might illuminate the choices that they face in their own philanthropy.

Wednesday, November 30, Session 2, 9:30 AM – 11:00 AM Participants will learn some strategies for their own good vs. good choices, including the analytical framework known as “effective altruism.” This session will strengthen participants’ ability to align their passions and interests with their giving, to say “no” as well as “yes”, and to use the resources of CFMC for research and evaluation.

This program is for donor advised fund holders. Please RSVP by November 9 to Philanthropic Services Officer Josh Warburg at joshw@cfmco.org or 831.375.9712 x127.

Adler is a trustee and program officer of the Claire Giannini Fund and consults with charities on governance and philanthropy. She practiced philanthropy law for 30 years at Adler & Colvin in San Francisco and now lives with her husband and dog in Pacific Grove. She is the co-author of “The Rules of the Road: A Guide to the Law of Charities in the United States” and is a past trustee of the UC Santa Cruz Foundation and the International Center for Not-for-Profit Law. Adler is a graduate of UC Santa Cruz and UC Berkeley Law and currently serves on the board of CFMC. She and her husband are donor advised fund holders at the CFMC.

Sharpe and Belli Join CFMC Board

The CFMC welcomes William F. Sharpe and Teri Belli to the board of directors.

Dr. William Sharpe is an internationally noted economist, a 1990 Nobel Memorial Prize winner in Economic Sciences and is the STANCO 25 Professor of Finance, Emeritus at Stanford University’s Graduate School of Business. Sharpe is one of the originators of the Capital Asset Pricing Model and developed the Sharpe ratio for investment performance analysis as well as other models used widely in investment.

Sharpe has been a member of CFMC’s Investment Committee since 2014 and is a board member for the Carmel Bach Festival, an advisory board member for the Community Partnership for Youth Ramon Avila Technology + Design Center, a member of the Investment Committee of Montage Health as well as an Advisory Council member to the Center for the Blue Economy at the Middlebury Institute of International Studies (MIIS). Dr. Sharpe is the author of seven books and is past President of the American Finance Association. He received his Ph.D., M.A. and B.A. in Economics from the University of California at Los Angeles.



“I’ve worked with organizations that have been generously supported by the Community Foundation and seen the fruits of its contributions firsthand. It is an honor to be able to serve.” — Dr. William Sharpe



“I’m honored and delighted to join the board. I look forward to being part of an organization that is truly an agent for positive change.” — Teri Belli

Teri Belli, of Salinas, is a CPA and principal of tBelli Business Consulting & Advising. She has more than 35 years of experience working within both public accounting and private practice, advising closely-held companies on strategic and financial business decision making. Her clientele includes agriculture, restaurants, wholesalers and nonprofit organizations. She also helps manage Belli Architectural Group.

Belli moved to Salinas in 1980, where she met and married her husband, Lino, raised their family and is very involved in the community. Belli is currently a board member of the Nancy Buck Ransom Foundation, the Hartnell College Foundation, and the Rotary Club of Salinas. Prior community service includes serving as President of the Rotary Club of Salinas, Treasurer of the Salinas Valley Half Marathon, and Chair of the Salinas Community YMCA and Central Coast YMCA boards of directors. Belli was named the 2009-2010 Rotarian of the Year for Salinas Downtown Rotary and the Salinas Chamber of Commerce 2016 Business Woman of the Year. Belli received her B.S. in Accounting from the University of Arizona.

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Steve McGowan, *Vice Chair*
Gail Delorey, *CPA Treasurer*
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Here for Good
Community Foundation
for Monterey County





Soberanes fire photo from CalFire

Inside

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- Monterey County Gives!
- Next Steps for Nonprofits
- Scholarships and New Funds
- Grantmaking Impact

Soberanes Fire Fund inspires local philanthropy (See p. 1)

HEALTHY, SAFE, VIBRANT Communities

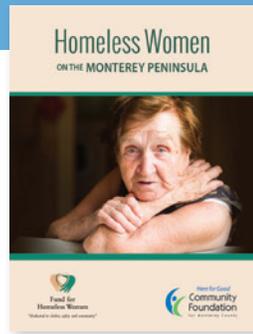
Report Sheds Light On Local Homeless Women

It is estimated that there are 400 women living without shelter between Marina and Carmel. A new report, *Homeless Women on the Monterey Peninsula*, documents the primary causes of homelessness for these women, their needs and challenges, and existing services and policies.

The report was commissioned by the Community Foundation for Monterey County (CFMC) on behalf of the Fund for Homeless Women, a field of interest fund of the CFMC. It is the first part of an expanded countywide study on homeless women expected in 2017.

Researchers surveyed 38 local service providers and nearly 60 homeless individuals and found that 40% of all unsheltered people in Monterey County are women. Homeless women on the Monterey Peninsula tend to be older than the average homeless person in the county; 34% of women surveyed were between the ages of 51-60 and 14% were 61 years or older.

To read the Key Findings and full report, or for more information on the Fund for Homeless Women, visit www.cfmco.org/fhw.



Now is the time you may be considering ways to integrate charitable giving into your financial planning. The Community Foundation for Monterey County offers many philanthropic vehicles to help you achieve your goals including:

Donor Advised Funds You receive an immediate tax deduction, plus the ease and flexibility of charitable giving with the support of the CFMC's Philanthropic Services staff to make grants in Monterey County and beyond. Donor advised funds can be created with a gift of \$5,000 or more.

Charitable Remainder Trusts & Charitable Gift Annuities Both offer tax deductions and income for life (a portion of which is tax free). The remainder creates a fund to benefit any nonprofit you choose.

Gifts of Real Estate or Appreciated Stock Both are a good option to benefit from an income tax deduction and capital gains tax savings.

IRA Rollovers If you are 70 1/2 or older, you could transfer up to \$100,000 annually against your Required Minimum Distribution and reduce the taxable balance of the IRA in your estate.

We realize you consider many factors as you make significant financial, estate and charitable decisions. You can give to causes you care about while gaining maximum tax benefit under state and federal law. Please contact us at (831) 375-9712 to learn more.